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Simple question: Who is feeling complacent right now? Answer: NOBODY! What can you do? Provide sound counsel and context to help alleviate investors' fears despite the headlines surrounding inflation. Here's how.

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By: David Richman | September 28, 2022

When asked about inflation, does each team member's answer harmonize? The best teams we encounter have a disciplined process to ensure consistent messaging by following five important steps.

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By: David Richman | September 8, 2022

Your clients do not expect you to have a crystal ball or a sense of certainty about what is likely to occur next week or in the weeks ahead. They want honesty from you. A thoughtful thesis—a timely, pithysound bite that connects the dots to the advice you are delivering—can make a significant difference in conversations with existing and prospective clients.

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[Candor and Clarity Coalesce in Uncertain Times](#)

By: David Richman | August 23, 2022

When turbulent markets disrupt investors' sense of financial security, remember the 4 C's of conversations—candor, clarity, commitment and calm. For some timely perspective on providing candor and clarity, we turned to Eddie Perkin, chief investment officer for equity, who shared some true wisdom. Consider these excerpts from our recent dialogue:

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['Today's Inflation Obsession Is Overdone'](#)

By: David Richman | August 4, 2022

Many advisors follow our time-tested approach to running [better first meetings](#). One important point to consider is positioning "why us" toward the end of your meetings for a number of reasons. In times like these, the "why us" discussion is made even more compelling by changing the thought to "why us NOW" by harnessing the power of these.

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'Today's Inflation Noise Is the Signal of the Past'

By: *David Richman* | July 12, 2022

With inflation continuing to be a headline story, this "market meme" presents an opportunity to break through investor inertia. How can you help prospects look past current headlines and be open to a first meeting? Consider harnessing the power of these.

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