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Chasing Positivity<sup>®</sup> > The Charismatic Advisor<sup>®</sup> in Conversation

## **LEARN** | Three strategies to understand purpose

One way to demonstrate empathy with prospects and clients is to seek to understand the desires that live underneath their goals. Gathering this type of information can help you position financial and investment advice in a manner that inspires action.

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Select each of the 3 strategies to learn more about how it can help you understand your audience's goal.



Expand financial discovery to include questions about purpose



<u>Diagnose real-world risk</u> tolerance ♀



Leverage pivotal moments to deepen client relationships Q



**Bottom Line** 

Applying these strategies can help you position advice to inspire others to take actions to help them to achieve what matters most in their lives.

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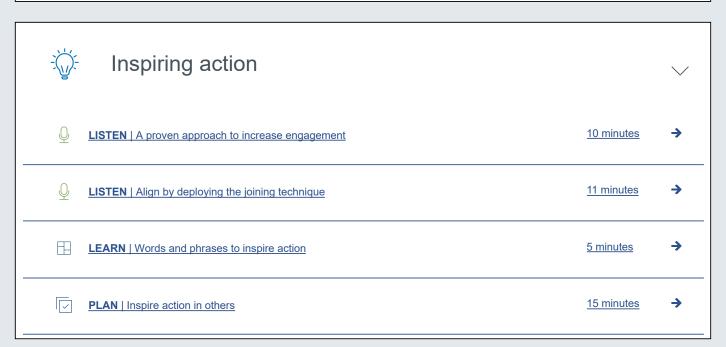
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.

$\Diamond$	Getting started		$\checkmark$
Ŷ	LISTEN   An approach to learning the <i>3 Dynamics</i>	6 minutes	<b>&gt;</b>
	WATCH   Why the 3 Dynamics matter	5 minutes	<b>&gt;</b>
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LEARN   Lead with genuine interest	<u>5 minutes</u>	
<b>LEARN</b>   Three strategies to understand purpose	<u>5 minutes</u>	
PLAN   Become more empathic	<u>15 minutes</u> →	

원과 Collaborating consciously	$\checkmark$	
<u>↓         LISTEN   Put away the black robe         <u>5</u> </u>	minutes >	
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	minutes →	
Image: Watch   Why intentionality matters     61	minutes →	
LEARN   Engage clients based on their coping style       51	minutes →	
PLAN   Become a better collaborator     15	<u>5 minutes</u> →	



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