LEARN | Three strategies to understand purpose

5 minutes

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.

1

Expand financial discovery to include questions about purpose

2

Diagnose real-world risk tolerance

3

Leverage pivotal moments to deepen client relationships

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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What's next?

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.

Getting started

LISTEN | An approach to learning the ***3 Dynamics***	6 minutes
WATCH | Why the ***3 Dynamics*** matter	5 minutes
LEARN | A road map to master the ***3 Dynamics***	5 minutes
LEARN | Prepare for success	3 minutes

Communicating empathically

LISTEN | Practice leaving yourself behind	8 minutes

LEARN | Lead with genuine interest — 5 minutes

LEARN | Three strategies to understand purpose — 5 minutes

PLAN | Become more empathic — 15 minutes

Collaborating consciously

LISTEN | Put away the black robe — 5 minutes

LISTEN | Beware of painting with a broad brush — 5 minutes

LISTEN | Don't take the bait — 5 minutes

WATCH | Why intentionality matters — 6 minutes

LEARN | Engage clients based on their coping style — 5 minutes

PLAN | Become a better collaborator — 15 minutes

Inspiring action

LISTEN | A proven approach to increase engagement — 10 minutes

LISTEN | Align by deploying the joining technique — 11 minutes

LEARN | Words and phrases to inspire action — 5 minutes

PLAN | Inspire action in others — 15 minutes

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