Eaton Vance

PRODUCT FINDER

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INSIGHTS

UNITED STATES

WEALTH STRATEGIES INVESTMENTS

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Chasing Positivity[®] > The Charismatic Advisor[®] in Conversation

PRODUCT FINDER

PLAN | Inspire action in others

15 minutes

We encourage you to complete this activity in one sitting since work in progress is not saved. You can print the output from this activity in PDF after completing the exercise. All fields are private and will not be shared with Eaton Vance.

- Prefer to create a plan on paper?
- ▲ DOWNLOAD THE PDF
- SHARE BY EMAIL

Instructions

Evaluate how effectively you inspire others to take actions that you believe are in their best interests. Based on your assessment, use the space provided to identify the approaches you want to master and how you plan to embrace them.

Foster a motivating environment



Lead discussions with questions that help you understand the desires that live underneath the prospect or client's goals

Select an item

Advocate for what's most important to them

Select an item

_ist the approaches to maste

Type your answer here.

Sample:

Learn more about passions and interests.

Action items to embrace the approaches

Type your answer here.

Sample

Early in discussions, ask these types of questions:

"What are you passionate about?"

"How do you enjoy spending your free time?"

"What motivates you to dedicate so much energy to your career?"

NEXT >

Show how your recommendations are likely to improve someone's life

Solicit feedback on the suggestions and recommendations you make

Select an item

Position recommendations as enhancements to available alternatives

Select an item

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Type your answer here.

Sample:

Do a better job of framing recommendations.

Action items to embrace the approaches

Type your answer here.

Sample:

When presenting recommendations, clearly explain two to three benefits the client can anticipate by following your suggestions.

<u>NEXT</u>

Intentionally prepare clients to cope with setbacks

Keep clients up to date regarding the likelihood of achieving their desired financial outcomes

Select an item

Remind clients how you closely monitor investments, global cross currents, and potential implications for their financial situations

Select an item

Recognize the client's coping style; then adjust your approach for engagement when discussing potential setbacks

Select an item

List the approaches to master

Type your answer here.

Sample:

Regularly keep clients up to date on likelihood of goal achievement.

Action items to embrace the approaches

Type your answer here.

Sample:

At least once a year, have a conversation about progress toward goals.

Conduct additional conversations about goal achievement during times of market disruption, personal setbacks or if new tax legislation is enacted.

Print a copy of your worksheet for your records

PRINT

Well done! You've created a personalized plan to inspire others to take action.

You are on your way to chase positivity by:

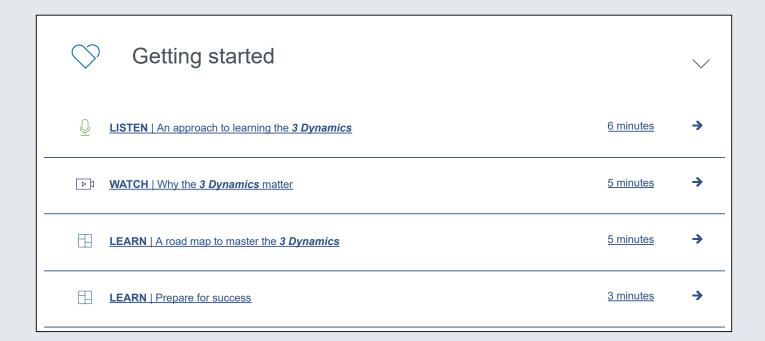
- Identifying ways to enhance how you motivate others to take actions that you believe are in their best interests
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

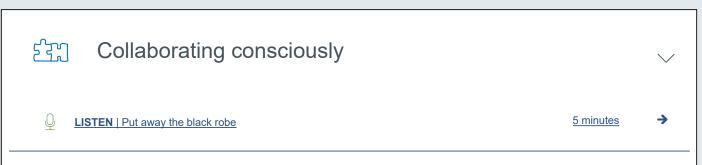


What's next?

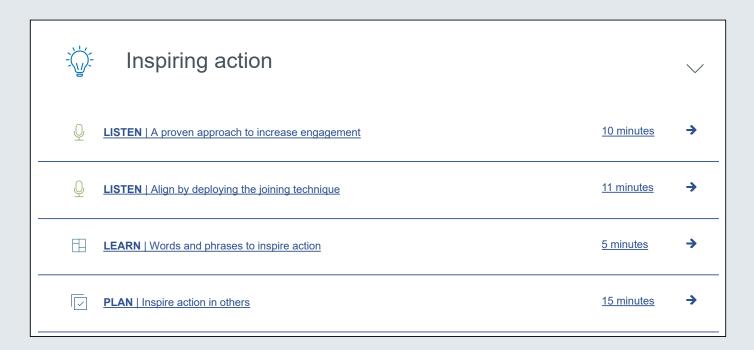
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.







Ŷ	LISTEN Beware of painting with a broad brush	<u>5 minutes</u>	→
Ŷ	LISTEN Don't take the bait	<u>5 minutes</u>	→
۲ _۹	WATCH Why intentionality matters	<u>6 minutes</u>	→
	LEARN Engage clients based on their coping style	<u>5 minutes</u>	→
	PLAN Become a better collaborator	<u>15 minutes</u>	→



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	Separately Managed	The Advisor Institute	Laddered Investing Interest	DST Vision
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