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[Capture Referable Moments: "The Soft Landing Is Firming"](#)

By: [David Richman](#) | July 10, 2024

What are the top three topics to pop up in conversation between your clients and their friends this summer? The election, inflation and interest rates. Today's frothy markets are all significant *market memes*—stories people are buzzing about that have significant implications for financial decision making.

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Managing Director
Advisor Institute

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["Muni Bonds Will Win the Election": A Thesis to Capture Referable Moments](#)

By: *David Richman* | *July 8, 2024*

When a big market meme—the upcoming election—collides with summer gatherings, it creates a crescendo of referable moments. A referable moment is anytime the topic of financial markets, money, retirement, financial plans or legacy comes up in conversation between your client and a friend, family member or colleague when you're not in the room. It either turns into a conversation about you or it doesn't.

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Advisor Institute

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By: *Holly Swan* | *June 26, 2024*

Even in the digital age, as clients grapple with infinite information at their fingertips, those seeking to effectively manage their money still benefit from thoughtful, specifically-tailored advice. This is one essential truth of the industry that doesn't change across years, technologies, or generations. Yet it can be difficult to emphasize your value to the adult children of your aging clients.

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[Asking Open-Ended Discovery Questions in First Meetings](#)

By: *Holly Swan* | *June 19, 2024*

The client interview is at the heart of our [5 steps to better first meetings](#), because it is an opportunity to ask discovery questions to help provide insight into how life and money intersect for each prospective client. As you prepare for a first meeting with a prospective client, it's important to ask questions that can help uncover the source of their wealth and any biases they may have when it comes to their portfolios.

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[The BEAT Can Help You Answer "Why Us, Now?"](#)

By: David Richman | June 13, 2024

Every first meeting with a prospective client has a pivotal "Why us?" moment after you've asked thoughtful discovery questions. It's the moment you inspire them to overcome their status quo bias and choose you as their advisor. The June issue of [The BEAT](#) can help you navigate today's increasingly confusing crosscurrents and help you inspire prospective clients to change their current trajectory.

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Attracting Clients

[Five Steps to Better First Meetings](#)

By: David Richman | June 6, 2024

Do many of your first meetings end with the prospective clients saying, "Let us think about it"? If so, you may have what we call *mushy pipeline syndrome*—a devastating disease that can zap your spirit and time efficiency.

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Managing Director
Advisor Institute

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[Two Antidotes to the Premature Pivot](#)

By: David Richman | May 29, 2024

Every phone call unfolds like a decision tree. The choices you make in real time have a profound impact on the trajectory and success of your call.

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Managing Director
Advisor Institute

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By: Holly Swan | May 23, 2024

In the months ahead, be prepared to encounter prospective clients who are concerned about the impact of the presidential election on taxes and ask you, "what are you telling your clients today?" Using a tax tenet as your response can help turn a follow-up phone call into a first meeting.

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[Cash Will No Longer Be King](#)

By: David Richman | May 22, 2024

Many investors have become complacent sitting on the sidelines due to the high yields they've been earning on cash. Complacency is a strong driver of inertia, perhaps the strongest of all.

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Managing Director
Advisor Institute

Attracting Clients
[Turn First Encounters into Follow-Up Phone Calls](#)

By: David Richman | May 16, 2024

Today's dynamic markets should make for interesting first encounters in the weeks ahead. Consider harnessing the power of a *curiosity gap*—the space between what someone knows and what they're intrigued to know. A pithy *ism*, timeless sound bite conveying your financial beliefs, or *thesis*, timely statement about market conditions, can help you create a curiosity gap that leaves people wanting to learn more in a follow-up phone call.

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Managing Director
Advisor Institute

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[Prospecting Calls: Reframe Your Mindset on the Purpose](#)

By: David Richman | May 8, 2024

When you call a prospective client, would you say that your purpose is to get a meeting? What if you reframe the purpose of your call to determine if a meeting makes sense? You might think there's a subtle difference—hardly. We think the benefits are considerable.

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[Replace the Commonplace: Start Conversations Without "How Are You?"](#)

By: David Richman | April 30, 2024

Consider the cost of asking this question rather unwittingly, without a moment's reflection at the start of your follow-up phone calls: "How are you?" While cordial and somewhat deferential, it's oh so commonplace.

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Managing Director
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Attracting Clients | [Concentrated Positions](#)
[Cocktail Parties, Concentrated Positions and the CAR Framework](#)

By: *Holly Swan* | April 24, 2024

Let's say you meet someone at a cocktail party who, upon hearing what you do for a living, confides they don't know what to do with a highly appreciated concentrated stock position. How can you respond to lay the groundwork for a potential follow-up conversation? Use the CAR framework: Celebrate. Ask. Remind.

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Holly Swan
Executive Director
Advisor Institute



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