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Our latest commentary to help you elevate the success of your practice

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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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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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By: David Richman | April 18, 2024

With so many economic crosscurrents and geopolitical tensions, do first encounters ask you what you're telling clients when they find out you are a financial advisor? Use an ism and, perhaps, a thesis as answers.

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By: David Richman | April 10, 2024

Did you approach your last networking event full of intention with the hope of meeting new people, only to get caught up in conversation with

one or two encounters? Perhaps it's time to discover the power of "the disengage" when it comes to making first encounters count.

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