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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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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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