

[< Back to The Advisor Institute](#)

# Coach's Corner

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

Disclosure



*The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.*

## LATEST INSIGHTS

[Attracting Clients](#) | [Bridge to Referrals](#)

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

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

[READ THE BLOG POST](#)

[Attracting Clients](#) | [Bridge to Referrals](#) | [Elections](#)

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

By: [David Richman](#) | July 8, 2024

[READ THE BLOG POST](#)

[Attracting Clients](#) | [Working with the Wealthy](#)

### [Connecting to the Next Generation](#)

By: [Holly Swan](#) | June 26, 2024

[READ THE BLOG POST](#)

[Search our insights by topic category or author](#)



## All Articles (9)

[Attracting Clients](#) | [Bridge to Referrals](#)

### [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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#) | [Elections](#)

### ["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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#)

### [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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#)

### [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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#) | [Navigating the Curve](#)  
[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.

[READ MORE](#) ▼



David Richman  
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.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

[Attracting Clients](#)

## [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.

[READ MORE](#) 



David Richman  
Managing Director  
Advisor Institute

[Attracting Clients](#) | [Chasing Positivity](#)

## [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.

[READ MORE](#) 



David Richman  
Managing Director  
Advisor Institute



### HEADQUARTERS

One Post Office Square  
Boston, MA 02110

#### [Investments](#)

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed  
Accounts](#)

[Closed-End Funds and  
Term Trusts](#)

#### [Insights](#)

[Advisory Blog](#)

[The BEAT](#)

[The Advisor Institute](#)

#### [Taxes & Tools](#)

[Investment Tax Center](#)

[Tax Information](#)

[Investment Tax Calculator](#)

[Laddered Investing Interest  
Rate Scenario Tool](#)

[Concentrated Stock  
Position Calculator](#)

[Tax-Equivalent Yield  
Calculator](#)

#### [Resources](#)

[Forms & E-Delivery](#)

[Mutual Funds & Unclaimed  
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**, the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). For **closed-end funds**, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or [download a copy here](#).

Before purchasing any **variable product**, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved.

Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Wednesday, June 5, 2024 12:02 PM

Page ID: 4600 - <https://www.eatonvance.com/advisor-institute-coachs-corner.php>