

Coach's Corner

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

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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.

These days we have a crescendo of *referable moments*—anytime a market meme pops up in conversation between your client and a friend, family member or colleague, yet you're not in the room.

Let's consider the frothy market. Many of your clients could find themselves in conversation with a friend in the weeks ahead who says:

"This market is way too frothy. We are sitting in cash waiting for the correction. The market has it wrong and the Fed will not be lowering rates."

Did you capture these referable moments or squander them? Increase your chances of capturing them by identifying and articulating your *thesis*—a timely, pithy sound bite that connects the dots to the advice you provide.

For thesis inspiration, we turned to the July issue of [The BEAT's](#) key takeaway of slowing wage growth in the U.S. and Eurozone (see charts on page 5) which in turn should help ease persistent services, inflation, and allow central banks to adjust rates lower. What if your client was to respond to their friend with this thesis: "The soft landing is firming."

Such a response will likely kindle some curiosity and lead your client's friend to ask, "Where did you hear that?"

"The soft landing is firming" illustrates the four best practices of thesis development:

1. Timely: Responsive to a market meme based on current data-driven insights.
2. Pithy: It is easy to remember in the hopes clients will repeat it in conversations with friends, family or colleagues.
3. A soundbite: The play on words of "soft landing" with "firming" provides a unique and intriguing edge.
4. Connect-the-dots: It aligns with the current insights [The BEAT](#) offers advisors.

Bottom Line: Harness the power of a well-articulated thesis to help you capture referable moments when you aren't in the room.

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David Richman
Managing Director
Advisor Institute

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