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Chasing Positivity® > The Charismatic Advisor® in Conversation

LEARN | Engage clients based on their coping style

5 minutes

Life events or market volatility can disrupt a client's sense of financial security. When you understand clients' specific coping styles, you can adjust your approach to help them manage uncomfortable emotions, increase their personal control and chase positivity.

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Two common client coping styles



Dragon

- Places others on the defensive
- Prone to expressing anger and sarcasm
- Displays a confrontational demeanor, sometimes in a muted fashion

<u>Dragons can make you feel anxious if you have not yet figured out how best to manage their combative behaviors, lessening the likelihood you can help minimize their inertia.</u>

Strategies to engage a dragon Q

or



Ostrich

- Uses denial to deal with financial anxiety
- May not open financial statements or check on his/her portfolios or extended periods
- Unlikely to contact you when his/her anxiety is high
- Likely to put off responding to your calls or emails

A lack of contact does not mean the client isn't worried about his/her portfolio. Taking such a stance will only intensify client frustration and anxiety.

Strategies to engage an ostrich Q

Bottom Line



By becoming a source of strength, not a silent partner, you can help dragons and ostriches cope with financial uncertainty, reinforce resilience in your clients and ensure an ongoing productive relationship with them.

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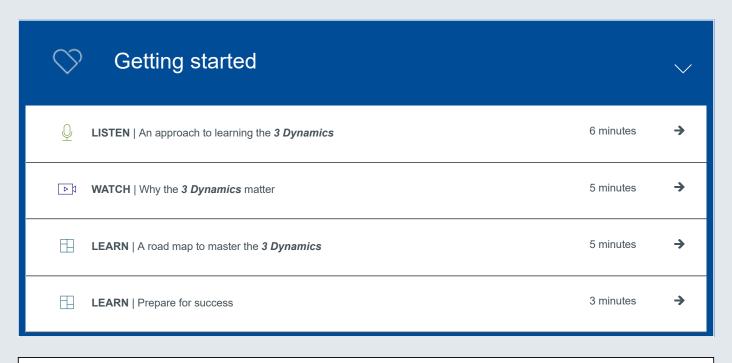
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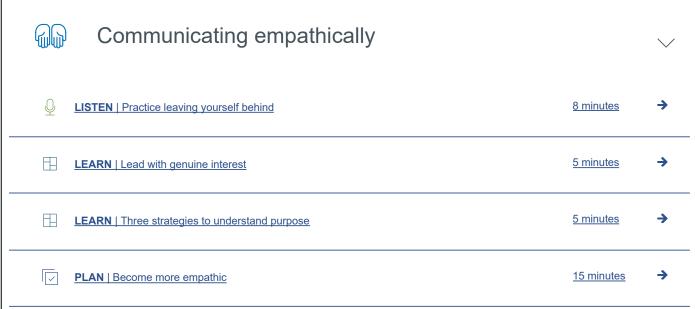
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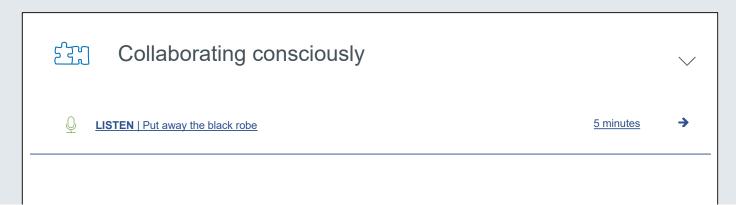
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If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.







<u>Q</u>	LISTEN Beware of painting with a broad brush	5 minutes	→
<u> </u>	LISTEN Don't take the bait	<u>5 minutes</u>	→
	WATCH Why intentionality matters	6 minutes	→
	LEARN Engage clients based on their coping style	<u>5 minutes</u>	→
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Inspiring action	<u> </u>
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Publication details: Tuesday, March 5, 2024 10:50 AM

Page ID: 40239 - https://www.eatonvance.com/learn-engage-clients.php