

PRODUCT FINDER

**WEALTH STRATEGIES** 

**INVESTMENTS** 

INSIGHTS

TAXES AND TOOLS

< Back to overview

Chasing Positivity® > The Charismatic Advisor® in Conversation

# LEARN | A road map to master the 3 Dynamics

The *3 Dynamics* are guideposts for you to chase positivity and minimize the gravitational pull of inertia. Explore each Dynamic independently prior to attempting to bring them together in conversation.

Prefer to save for later?

L DOWNLOAD THE PDF
SHARE BY EMAIL

Select each area to learn more about mastering each of the **3 Dynamics** 



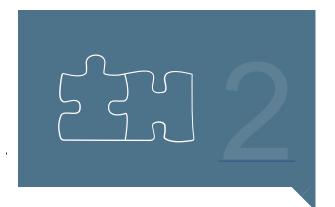
**FIRST** 

Focus on communicating empathically Q



**THIRD** 

Direct your energies to inspiring action ♀



SECOND

Focus on collaborating consciously Q



### **Bottom Line**

Taken together, the *3 Dynamics* provide a genuine approach for having conversations that inspire someone to take actions that are in their best interests.

Attracting Clients | Chasing Positivity
Replace the Commonplace: Start Client Conversations Without "How Are You?"

By: David Richman | April 30, 2024

READ MORE

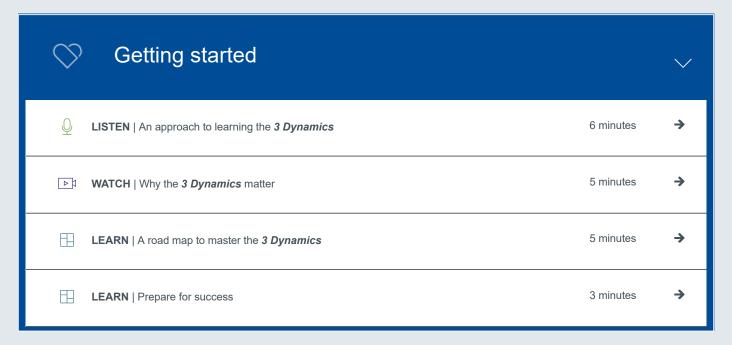
Attracting Clients | Bridge to Referrals | Chasing Positivity
Seize Opportunities Presented by Volatility with a Thesis

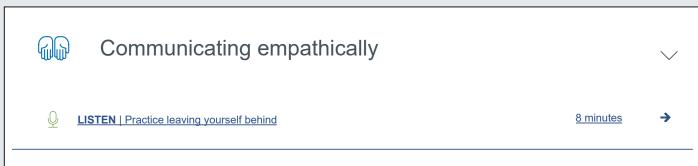
By: David Richman | April 22, 2024

READ MORE

## What's next?

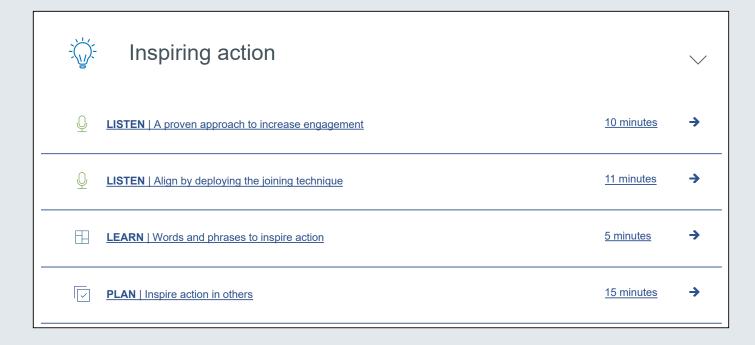
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.





LEARN   Lead with genuine interest	<u>5 minutes</u>	<b>→</b>
LEARN   Three strategies to understand purpose	<u>5 minutes</u>	<b>→</b>
PLAN   Become more empathic	15 minutes	<b>→</b>

ट्रिं Collaborating consciously	\ \
LISTEN   Put away the black robe     5 minutes	<b>→</b>
LISTEN   Beware of painting with a broad brush     5 minutes     ■	<b>→</b>
	<b>→</b>
▶ WATCH   Why intentionality matters 6 minutes	<b>→</b>
LEARN   Engage clients based on their coping style 5 minutes	<b>→</b>
PLAN   Become a better collaborator 15 minute	<u>s</u> →









**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

Market Update Events

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 & Abandoned

<u>Property</u>

**DST Vision** 

Active Advisor

Corporate Filings

Annual Reports

Press Releases

**Diversity and Inclusion** 

Accessibility	Business Co	ontinuity	Privacy & Cookies	Your Privacy Choices 🕢🗙	Terms & Conditions	<u>Careers</u>	<u>Contact</u>	
Investor Account Access		<u>Morgan</u>	Stanley Investment M	anagement Terms of Use				

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.

뎎 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 <u>download a copy here</u>. 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 <u>download a copy here</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or <u>download a copy here</u>.

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: Tuesday, March 5, 2024 10:50 AM

Page ID: 40238 - https://www.eatonvance.com/learn-roadmap-to-master.php