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Chasing Positivity® > The Charismatic Advisor® in Conversation

LEARN | Three strategies to understand purpose

One way to demonstrate empathy with prospects and clients is to seek to understand the desires that live underneath their goals. Gathering this type of information can help you position financial and investment advice in a manner that inspires action.



Select each of the 3 strategies to learn more about how it can help you understand your audience's goal.



Expand financial discovery to include questions about purpose Q

2



<u>Diagnose real-world risk</u> <u>tolerance</u> ♀

3

Leverage pivotal moments to deepen client relationships Q



Bottom Line

Applying these strategies can help you position advice to inspire others to take actions to help them to achieve what matters most in their lives.

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

By: David Richman | April 30, 2024

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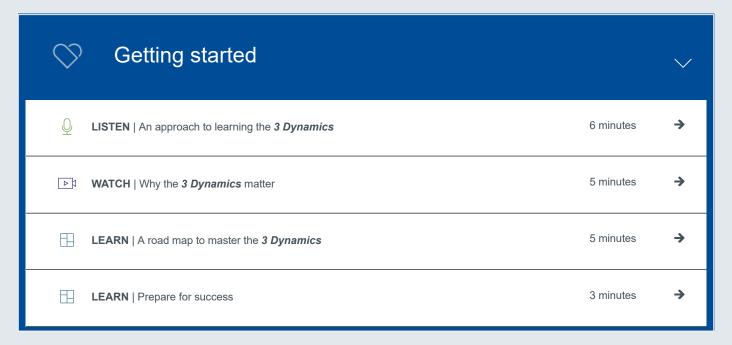
Attracting Clients | Bridge to Referrals | Chasing Positivity
Seize Opportunities Presented by Volatility with a Thesis

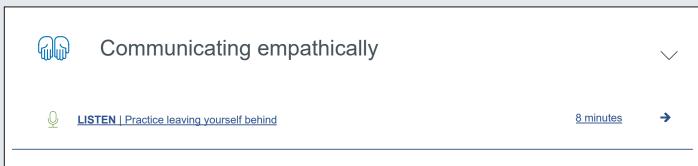
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What's next?

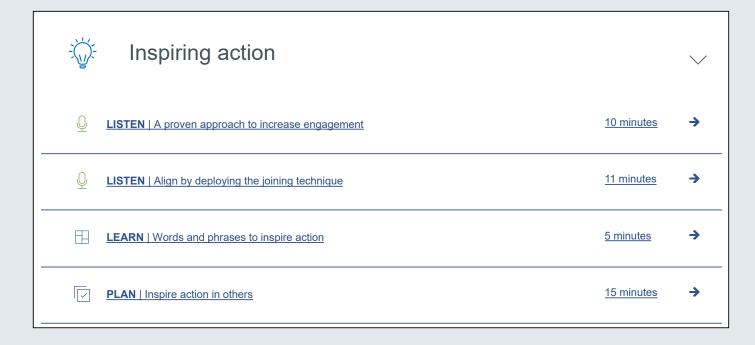
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.





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

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









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