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LEARN | Three strategies to understand purpose

5 minutes

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.

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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](#) 🔍



[Diagnose real-world risk tolerance](#) 🔍



[Leverage pivotal moments to deepen client relationships](#) 🔍



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.

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[Replace the Commonplace: Start Client Conversations Without "How Are You?"](#)

By: [David Richman](#) | April 30, 2024

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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.



Getting started



LISTEN | An approach to learning the **3 Dynamics**

6 minutes



WATCH | Why the **3 Dynamics** matter

5 minutes



LEARN | A road map to master the **3 Dynamics**

5 minutes



LEARN | Prepare for success

3 minutes



Communicating empathically



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[8 minutes](#)





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PLAN | [Become more empathic](#)

[15 minutes](#)



Collaborating consciously



LISTEN | [Put away the black robe](#)

[5 minutes](#)



LISTEN | [Beware of painting with a broad brush](#)

[5 minutes](#)



LISTEN | [Don't take the bait](#)

[5 minutes](#)



WATCH | [Why intentionality matters](#)

[6 minutes](#)



LEARN | [Engage clients based on their coping style](#)

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PLAN | [Become a better collaborator](#)

[15 minutes](#)



Inspiring action



LISTEN | [A proven approach to increase engagement](#)

[10 minutes](#)



LISTEN | [Align by deploying the joining technique](#)

[11 minutes](#)



LEARN | [Words and phrases to inspire action](#)

[5 minutes](#)



PLAN | [Inspire action in others](#)

[15 minutes](#)





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