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# LEARN | Three strategies to understand purpose

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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 Conversations Without "How Are You?"](#)

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

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## What's next?

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### Getting started



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### Communicating empathically



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## Collaborating consciously



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## Inspiring action



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