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Chasing Positivity[®] > The Charismatic Advisor[®] in Conversation

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



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



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.

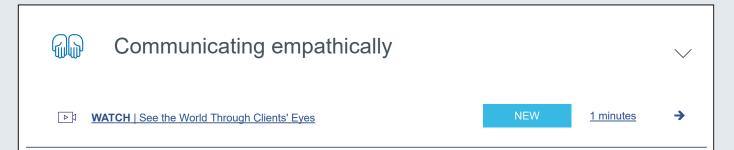
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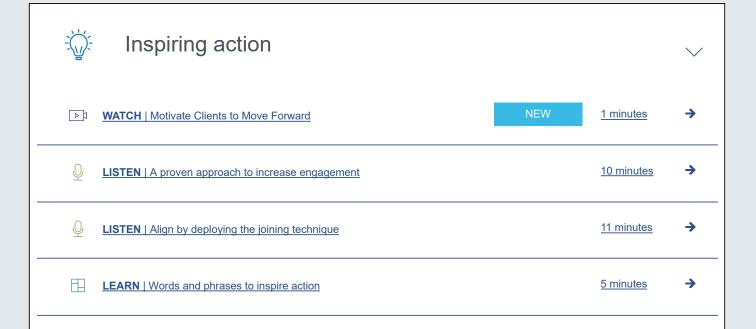
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.

\Diamond	Getting started			\checkmark
	WATCH 3 Dynamics to Overcome Client Inertia	NEW	1 minutes	>
Ŷ	LISTEN An approach to learning the 3 Dynamics		6 minutes	>
E	LEARN A road map to master the 3 Dynamics		5 minutes	>
	LEARN Prepare for success		3 minutes	>



Ŷ	LISTEN Practice leaving yourself behind	<u>8 minutes</u>	→
E	LEARN Lead with genuine interest	<u>5 minutes</u>	→
Ē	LEARN Three strategies to understand purpose	<u>5 minutes</u>	→
	PLAN Become more empathic	<u>15 minutes</u>	→

टिंगु Collaborating consciously		\sim
Image: Watch Engage Clients in the Decision-Making Process NEW	<u>1 minutes</u>	→
	<u>5 minutes</u>	>
	<u>5 minutes</u>	→
LISTEN Don't take the bait	<u>5 minutes</u>	→
LEARN Engage clients based on their coping style	<u>5 minutes</u>	→
PLAN Become a better collaborator	<u>15 minutes</u>	→





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