

[< Back to overview](#)[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.

Prefer to save for later?

 [DOWNLOAD THE PDF](#) 

 [SHARE BY EMAIL](#)

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.

Chasing Positivity
[Turn Reflections into New Year's Actions](#)

By: [David Richman](#) | December 19, 2023

[READ MORE](#)

[Attracting Clients](#) | **Chasing Positivity**
[Pause Your Agenda. Turn on Agendaless Listening.](#)

By: [David Richman](#) | November 27, 2023

[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.



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



LISTEN | [Practice leaving yourself behind](#)

[8 minutes](#)





LEARN | [Lead with genuine interest](#)

[5 minutes](#)



LEARN | [Three strategies to understand purpose](#)

[5 minutes](#)



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](#)

[5 minutes](#)



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](#)





HEADQUARTERS

Two International Place
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
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#) [Terms & Conditions](#) | [Careers](#) | [Contact](#) | [Investor Account Access](#) | [Morgan Stanley Investment Management 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](#).

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 [download a copy here](#). 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 [download a copy here](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or [download a copy here](#).

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. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, February 27, 2024 12:05 PM

Page ID: 40237 - <https://www.eatonvance.com/learn-three-strategies.php>