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## < Back to overview

Chasing Positivity<sup>®</sup> > The Charismatic Advisor<sup>®</sup> 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.

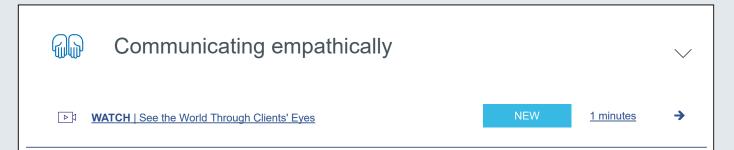
RELATED READING



## What's next?

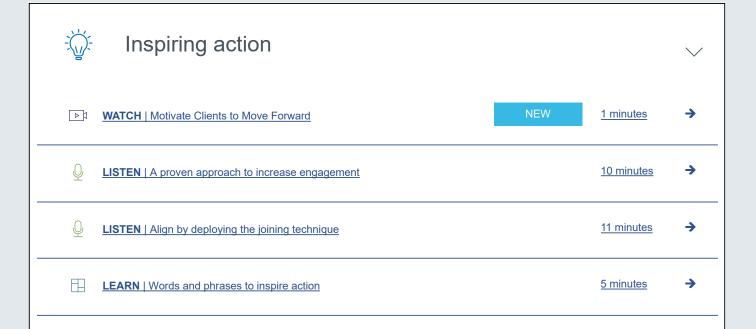
If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.

$\Diamond$	Getting started			$\checkmark$
	WATCH   3 Dynamics to Overcome Client Inertia	NEW	1 minutes	<b>&gt;</b>
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>	<b>→</b>
E	LEARN   Lead with genuine interest	<u>5 minutes</u>	<b>→</b>
Ē	LEARN   Three strategies to understand purpose	<u>5 minutes</u>	<b>→</b>
	PLAN   Become more empathic	<u>15 minutes</u>	<b>→</b>

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





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