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Chasing Positivity® > The Charismatic Advisor® in Conversation

LISTEN | Practice leaving yourself behind

8 minutes

Welcome. I'm David Richman of Eaton Vance Advisor Institute. I'd like to share with you today an approach to helping you attract more clients as well as deepen connectivity with your current clients. We call it "Leaving Yourself Behind." It might sound a bit selfless, and it actually is.

It's human nature for financial advisors, for other professionals to filter their advice through their own biases. Yet the best way to meaningfully help someone is to be completely emphatic in your approach by leaving yourself behind. This means doing your best to attempt to see the world through their eyes instead of your own. A doctor I interviewed years ago introduced me to this notion of leaving yourself behind. She had a completely closed practice. She was in such high demand. I asked her, "What's the one thing you do that makes you so effective and successful with patients?" Confidently, yet quite humbly I might add, she replied, "All I can tell you is that when I knock on the door of the examination room, I leave myself behind."

Let's visualize that for a moment. So before she walks into that examination room, she redirects her mindset away from herself as the doctor and focuses exclusively on the patient. She is being completely empathic. Let's bring this to your world. At a workshop a while back, a very well-established advisor was sharing a story about a conversation he had had with a client. She was a rather young widow, extremely affluent. Now, this client had a lifelong dream to buy a condominium in her favorite European city. She could comfortably afford the \$2-million price tag for the condo, yet something was holding her back from pulling the trigger.

So the advisor asked the audience for their thoughts on where the conversation should go. The advisors in the room were quickly jumping in. Someone said, "You need to show her why it's something she could easily afford." Someone else, "Your job is to help her enjoy her life and her money." Someone else even said, "You know, given what you've told us about her assets, this is silly. She needs to feel empowered to just do it."

After the advisor listened to this for a while, he said, "Well, let me share with you where I went. I asked her, 'What's really bothering you about this purchase?'"

After some conversation with some pretty deep probing, the client ultimately shared her innermost thought, "I keep hearing my mother's voice in my head." Her mother was deceased several years prior.

"I keep hearing my mother's voice in my head telling me that I'm being frivolous with my money." As you can see, it's not always really all that simple, is it?

Trying to convince this client that she can afford the condo might not address her underlying issue of potential guilt, so even if she went ahead and bought the condo, her conscious might have her feel it to be a joyless acquisition. Your role as an advisor, and in fact, I would

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Publication details: Tuesday, March 5, 2024 10:50 AM

Page ID: 39558 - <https://www.eatonvance.com/listen-advisor-institute.php>