

[< Back to overview](#)

Chasing Positivity® > The Charismatic Advisor® in Conversation

LISTEN | Practice leaving yourself behind

8 minutes

Chasing Positivity®

Practice leaving yourself behind



David Richman
National Director, Advisor Institute



THE ADVISOR
INSTITUTE

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

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.

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

One Post Office Square
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 & Unclaimed
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. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

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

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