

# Practical messages intended to help you elevate the success of your practice.

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NOVEMBER 5, 2020

## Conversations

### Are clients experiencing 'ambiguous loss'?

Dr. Pauline Boss, an educator who is widely recognized for her groundbreaking research, pioneered a theory of "ambiguous loss." Unlike the loss of a loved one, ambiguous loss is, well ... ambiguous.

You undoubtedly can point to a number of clients who you supported through the loss of a loved one. However, COVID-19 brings ambiguous loss to so many of us as we grapple with the loss of the life we enjoyed pre-pandemic.

If you have clients of my vintage, perhaps, like me, their biggest feeling of loss is the ability to kiss and hug their grandchildren. What about the young couple that had to settle for a Zoom wedding?

For many of your clients, the feeling that this virus is robbing them of tomorrow's memories may be driving a growing sense of sadness. Do you know whether clients are experiencing ambiguous loss? Have you allowed conversations to go to deeper places rather than settling for the superficial?

Recently, an elite advisor who we have worked with for many years set a consult with me and asked, "What are you seeing working these days for other advisors?" One of my answers related to the increased cadence of client conversations along with my strong belief that it is impossible to overcommunicate with your clients these days.

The advisor pushed back: "How many times can you really call to check in and ask, 'How are the kids'?"

My response took him aback: "You are a great listener and are genuinely curious. Lead with that curiosity. Don't settle for 'how are the kids' conversation — godeeper."

**Bottom line:** Today's ambiguous loss is real and presents an opportunity for you to go beyond the superficial, bringing your client relationships to another stratosphere.

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**David Richman**  
National Director  
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**"Have you allowed conversations to go to deeper places rather than settling for the superficial?"**



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