



THE PSYCHOLOGY OF ADVICE

becoming an emotionally intelligent adviser

Welcome to The Age of Engagement.

Client engagement is the vital factor in success as a professional financial adviser.

Clients' emotions are under attack. The post-GFC fallout has created a loss of trust and confidence in equity markets and the wider financial system. Retail investors are increasingly less trustful of investment markets and now more likely to challenge the central role of superannuation as a reliable primary retirement savings vehicle.

The introduction of regulatory reforms under The Future of Financial Advice will increase the levels of doubt about the value of advice for many clients. As a result of continued market volatility clients are likely to be experiencing significant emotional concerns and increased fears and issues about their financial security.

More than ever financial advisers need to focus on the emotional management and well being of their clients, not simply the technical solution. Masterful trusted financial adviser relationships combine both left and right brain thinking.

Thanks to science we now know more about client emotions than ever before. The fields of neuroscience, behavioral economics and emotional intelligence have provided significant insights into the psychology of advice, how clients think about their financial affairs and their emotional relationship with money and it's implications.

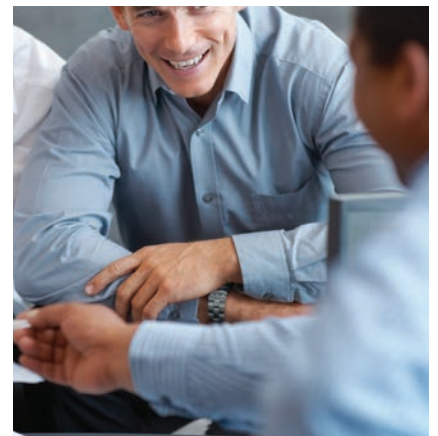
Using science-based teaching from these fields progressive thinking advisers can increase the confidence levels of clients throughout the advice process and ongoing relationship.

As the financial services industry moves into a new professional era, shaped by regulatory reforms such as opt-in, how advisers engage clients in a meaningful and valuable conversation and deeper relationship will separate the best from the rest.

Client engagement is more than a buzz word – it's the essential capability of an adviser to involve and influence clients to actively participate in their financial affairs to achieve optimum positive outcomes.

To be successful and navigate the challenging future of financial advice professional advisers will need to cultivate a mastery of both technical and strategic skills with highly evolved emotional and influencing capabilities.

This unique master training program blends the best practice client advice process with neuroscience-based emotional intelligence skills to create a powerful engagement capability for progressive advisers who seek to positively influence their clients' emotions at a deeper level and create more confident investors.



How to build trust in volatile times - mastering client emotions

Today financial advisers are under greater scrutiny than ever to demonstrate their value and provide a proven worth in their service to clients.

Every time an adviser sits across the table from a client or a prospective client it is a moment of negotiating trust. The advice relationship is high stakes.

People entrust more than their financial affairs to their adviser;

they invest their emotions, fears and dreams, because these intangibles cannot be separated from the business of money.

In negotiating the trust of a client two factors are in play – competence and empathy.

Trust = competence x empathy

A client is weighing up the merits of the adviser based on their perceived technical ability, as well as their ability to care and connect with the feelings of the client.

There is a growing body of evidence to argue that emotionally strong and secure clients make better investors.

These clients resist fearful and irrational reactions to market volatility and are focused and committed to their goals and aspirations as they can more clearly link the purpose of a financial plan to their life outcomes.

Are your clients emotionally strong investors?

Introducing The Psychology of Advice.

The Psychology of Advice is a program of mastery for managing client relationships.

Emotions are a critical element in every advisory relationship.

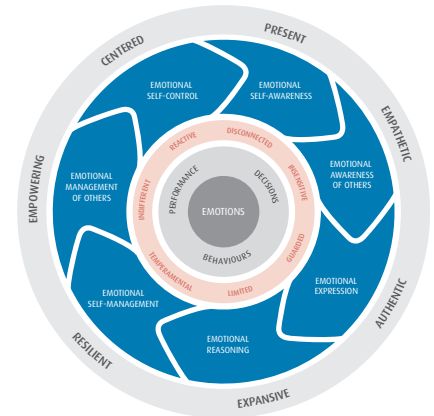
Traditionally advisers have never been trained in the skills to master relationships based on these intangible aspects of advice.

The good news is that emotions can be influenced and managed. Professional advisers can master the influencing and emotional intelligence skills necessary to positively control and guide the client's emotions and perceptions.

Using the foundations of emotional intelligence, a field of science developed over the past 2 decades, and the skills of influence, advisers can cultivate a high level of capability to expertly guide clients through the advice process. These emotional mastery skills will enhance the advisers' technical competence and strategic intelligence and create a more complete all round professional.



The Seven Emotional Engagement Factors.



Genos™ Model of Emotional Intelligence

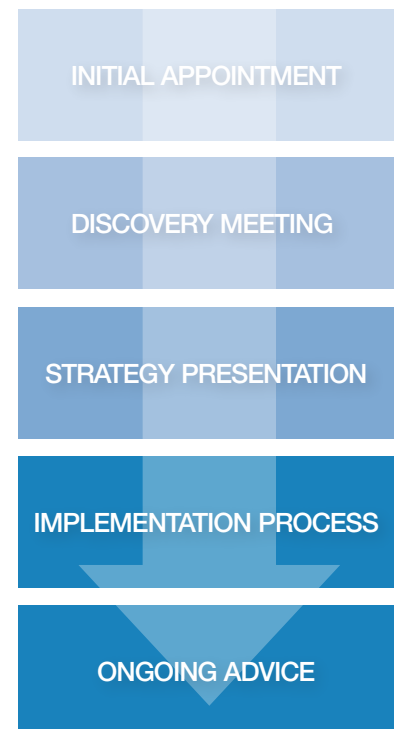
The Program Overview.

The Psychology of Advice is a 2 day plus coaching program for experienced advisers seeking to develop higher order client engagement skills mastery. The program is designed on a unique multi-dimensional approach, blending best practices in the client advice process with rigorous science-based techniques in influencing behaviours and emotions skills. The program is structured on blended learning: mastering theory of science-based ideas with practical application in the client interview situations, both in the workshop environment and through post-workshop coaching for sustained application of the skills.

The program covers:

The Best Practice Engagement Process

- **The Initial Appointment** – understanding a client's issues, concerns, and fears and aspirations, negotiating the need for advice and positioning your value as a trusted adviser
- **The Discovery Meeting** – deeply understanding the client's feelings and emotions around their money and financial capability and their sense of financial confidence
- **The Strategy Presentation** – understanding how to present information and recommendations to tap into the client's emotions and influence their positive feelings and perceptions
- **The Implementation Process** – how to involve the client in executing their strategy
- **The Ongoing Advice Conversation** – how to engage the client in their relationship with their financial plan and navigate their feelings and perceptions of their progress and sense of achievement





Learning Outcomes.

The Psychology of Advice is designed to prove advisers with tangible and provable skills to influence client emotions and perceptions.

After participating in this training advisers will be able to:

- More capably identify client emotions through the advice process
- Identify the deeper emotional fears and concerns of clients
- Manage negative or unproductive feelings and emotions of clients and counter these emotions
- Frame the value of the financial plan to create a more positive perceptions and increase client confidence.



Mastering the psychology of advice.

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EQ - The Engagement Edge.

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About Emotional Intelligence Worldwide.

Emotional Intelligence Worldwide is a consultancy specialising in people. Development programmes focus on emotional intelligence, positive psychology and personal development techniques to increase self-awareness and awareness of others, allowing for more effective performance. Research has shown emotional intelligence is a key component of exceptional performance.

We offer a comprehensive approach including assessment tools, training and development programmes and evaluation processes. Programmes are tailor-made to clients needs, ensuring that the training and facilitation reflects the individual organisations culture and objectives. Emotional Intelligence Worldwide aims to breathe the spirit into the minds of individuals and organisations to achieve their own level of excellence and drive performance.

People are the greatest asset of an organisation and progressive companies are acknowledging more than ever that strategies need to be in place to retain and grow their talent as they move forward. It is also recognized that fulfilled individuals outperform their peers.

Most organisations experience change on a regular basis in today's dynamic environment. Research has found "people resistance" was cited in 76% of cases as the greatest cause of failure in major organisational change projects.

Emotional Intelligence Worldwide can provide techniques for individuals, teams and organisations to function better, increase satisfaction and affect performance.



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THE FUTURE

The future is about people, organisations get things done through people more than ever before. Therefore, we need engaged people to perform. Emotional intelligence research indicates it is a key criteria in high performers in organisations – in many roles from leadership, sales to service and call centres.

Positive psychology research is also showing bottom line results in organisations through creating meaning, engaging people and increasing positive emotion.

Using these techniques can take your team and your organisation to the next level.

THE PSYCHOLOGY OF ADVICE

Enrol now in

YES, I'd like to become more masterful in the psychology of advice and positively influencing my clients' emotions and perceptions.

Please enrol me in the next Psychology of Advice workshop.

Surname

Mr Ms Mrs Miss Dr Other

Given names

Date of birth

Residential address

State

Postcode

Email

Telephone (BH)