

MANAGING YOUR CLIENT'S FIVE GREATEST FINANCIAL FEARS

Your clients face financial fears. Most people do. Young or old, your clients worry that their financial challenges may be insurmountable. They show a brave face to their family and to their colleagues but inside they tremble. Uncertainty underpins all of it. Uncertainty creates fear. It always has. It always will.

CAM MARSTON
GENERATIONAL EXPERT

25+ years of research into how generational change reshapes today's workplace, marketplace, and retirement transition.

You, the advisor, know better. Your financial training has taught you that few financial challenges are unalterable. You know what to do, what to expect, and what products can address your client's challenges. However, sharing your confident outlook requires knowing what your client's fears are and how to discuss them. And knowing how to do that requires knowing a bit more about your clients.

Life's Predictable Fears

- In early adulthood, your clients' fears are largely about themselves and their ability to earn and save.
- Later, the fears center around children and their future.
- Then, your client's ability to preserve good health and save funds for retirement.
- Then, it's a comfortable and productive retirement.
- Followed by the extraordinary human desire to be remembered.

Each of these life stages requires the savvy advisor to know how to communicate appropriately with the client going through these emotions, these phases of life. Supported by data and research, this presentation equips advisors to talk their clients through their fears and to instill confidence, resulting in more fully developed, long lasting, and fruitful client relationships.

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