



5 active listening tips

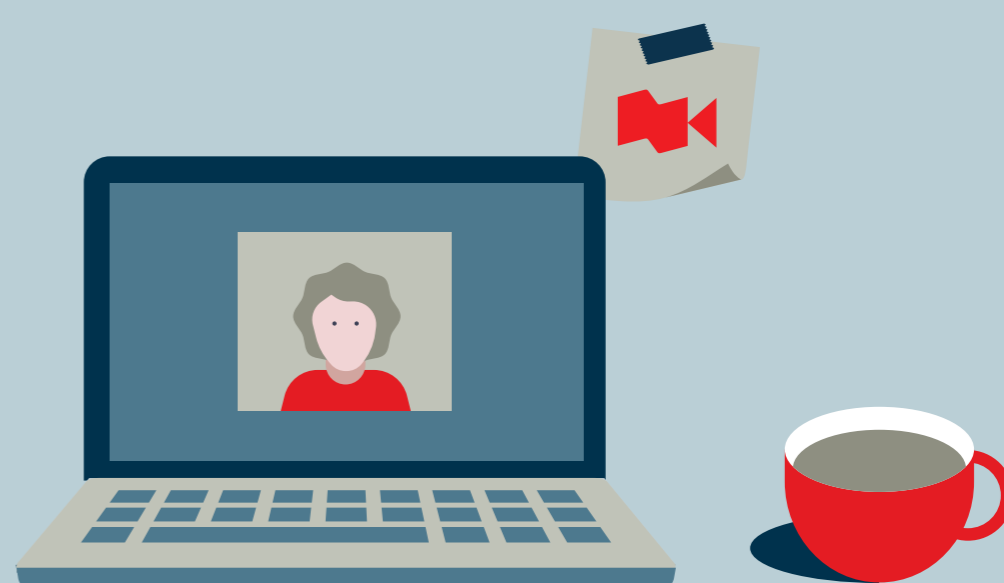
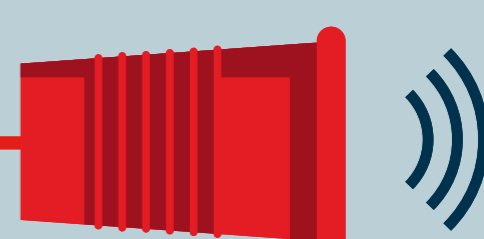
Active listening skills can help you get a holistic view of your clients' needs, which is more important than ever in the digital age.

1. Be in the moment

Ask yourself the following questions:

- › How do you absorb information?
- › How do you react to it?
- › What distracts you?
- › What irks you?

By learning to **identify your biases** and your triggers, you can **minimize your reactions** and get in the moment.



2. Understand your client

Active listening is about the person in front of you.

Ask **open-ended questions** to figure out **what's important to them**.

The goal is to get at the **intent**, the **emotion** and the **important facts** behind what they're saying on the surface.



3. Change the script

Do you have a script that never changes no matter what meeting you're in or who the client is?

Active listening helps you **figure out what's right for the client** so you can tailor your approach, then **reframe your expertise and knowledge** to help them achieve their goals.

4. Go beyond small talk

In online meetings, if we turn off our cameras, we lose the **ability to read our clients' expressions**.

When a client asks you a question like, "Am I going to be okay?" your job is to figure out what "okay" means to them. Is it performance? Costs? Volatility?

We **can't just take their responses at face value**.

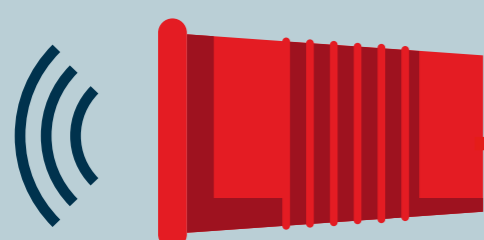


5. Give added value

An advisor's job is to adapt and **reframe their expertise so that it's personalized and it resonates with the client**.

- › What are their priorities?
- › What's their understanding of risk?

You need to be able to communicate information to clients **in a way that makes sense to them**. And don't forget the emotional side of investing.



Clients want to feel like they're being listened to, and that's what active listening is all about. And when you're doing it right, your client will sense that you care.

With these skills, you'll have a much richer conversation and a much deeper relationship. For advisors, that equals client loyalty.