

SCRIPTING FOR TURBULENT TIMES: 2020

YOUR CLIENTS WILL ALWAYS REMEMBER YOUR VOICE

With the level of current and future expected market volatility, if you aren't conveying the key messaging in the scripting to your best clients, you are missing an opportunity to reinforce you, your team and your process.

Being your client's personal CFO (Complete Family Office) becomes more relevant than ever at this point in time. This reinforcement will serve you and your clients, allowing you to endure together through another critical event in their lives.

It is during times like this, when people are vulnerable, that they want to talk. It is very likely your best clients are speaking with friends and family who may be scared, frustrated, looking for guidance and ready for a change. At a minimum they need a sounding board. You need to be that person, not only for your clients but also for the people who are an important part of their lives.

We do believe people need community and to know that they are not alone. Eventually we will find our footing. Communication - ***your voice*** - will, at the end of the day, be far more important to your clients than emails and social media.

Seize volatility for the opportunity it is.

SCRIPTING NOTES

In order for the scripting to be effective the team member first has to have sufficiently addressed any issues or anxieties with their client, we have included several issues for reference.

We would recommend that the team continuously gather questions, concerns and observations that are being shared by the clients and how the team members are responding. Revisit this daily, weekly and move to monthly based on your assessment of the environment.

These conversations need to be consistent and ongoing. 98% of the conversation will focus on Family, Occupation and Recreation.

For example, there have been significant cancellations, how are they coping? What about their son or daughter who is now leaving school (university) and their friends, how are they doing? Listen and you will know exactly how to respond.

"You know, client, these are uncertain and challenging times right now. And, it's important for me to remind you that I'm here for you as a resource to help you and those you care about."

Focus the conversation on Family, Occupation and Recreation. At this point in time any of these areas may be impacted; trips cancelled, jobs interrupted, stress and anxiety for the family. Often listening is what they need most.

KEEP THE FOLLOWING TO A MINIMUM

- Re-emphasize how a well-diversified portfolio `protects` during times like these
- Reinforce your client's long-term goals and objectives
- Realize the peril of veering from the plan during corrections like these
- Understand the role of the media and its ability to generate panic to ensure viewership and ratings

Ultimately, you are being the voice of reason (and saving them from making bad decisions while in an emotionally charged state).

THE INTRODUCTION SCRIPT FOR TURBULENT TIMES

Fine tune the nuances of this script so that you can deliver it in your own voice with a conviction, empathy and commitment to stand together.

"Understandably, there are many people right now who are stressed and may have a great deal of anxiety about their investments, the market and their financial future. Some may even be experiencing significant life events right now and require professional guidance and advice on what to do in the midst of all of this. Regardless, we are talking about people's life savings here – so it isn't something to be taken lightly. Not now, and not ever.

"If you should speak to someone you care about that needs help or guidance, give me a call or email me and let me know. I will make the time to reach out to them because if they are important to you, they are important to me.

"Do you have any questions?"