

ANCHORING & ADJUSTING PLANNER

When making a prediction, we tend to adjust our estimates from a given starting point (the anchor). This is particularly true in making numerical predictions.

CLIENT _____ DATE _____

What are their current beliefs?

What do they expect from their investments? Why?

What other options are they considering?

Where can I help them adjust their expectations by replacing an anchor with a range of possibilities?

Where can a calculator or other tool help create effective anchors?

Where can I help Clients become more savvy consumers?

How else can I help Clients set effective anchors for things like professional services and investment options?

How can I help Clients become more aware of artificial anchors set by less-ethical operators?

