

THE PSYCHOLOGY OF ADVICE:

HELPING CLIENTS MAKE DECISIONS THEY TRUST

This workshop goes beyond Behavioral Finance to give you a holistic toolkit for helping clients fight cognitive bias, heuristics, and mental “blind spots” that hamper decision-making AND TRUST.

WORKSHOP AGENDA

The empirical basis for consultative advising
The data – and people – clients trust most
Why FIL carries more weight than FA or CFP
How clients separate the signal from the noise
Helping clients anchor to the right information
Removing the barriers to rational decision-making
Helping clients feel the need for action

YOUR FACILITATOR



Dan Smaida has spent 23 years training advisors all over the world.

YOU SHOULD ATTEND IF...

...you want to help clients make good decisions they trust
...you have clients who rely too much on uninformed sources
...you want to know how top advisors are using best practices from psychology

PROVEN STRATEGIES THAT INFLUENCE CLIENT DECISIONS

Managing Cognitive Biases and Heuristics



Using the Ladder of Trust to position advice



Anchoring clients to the right information



The bottom line: Applying psychological best practices to client engagement helps you

BUILD TRUST AND HELP CLIENTS

STRATEGIES PIONEERED BY NAMES YOU TRUST



WHAT YOUR PEERS ARE SAYING

“Really practical advice I can apply to my business right away.”

- Joseph L, financial planner

“The Ladder of Trust is a great way to visualize my advising strategy!”

- George M, financial planner

“I definitely see how I can use these ideas to help clients trust the process.”

- Alison S, practice leader

TO REGISTER:

www.advisoryedge.com