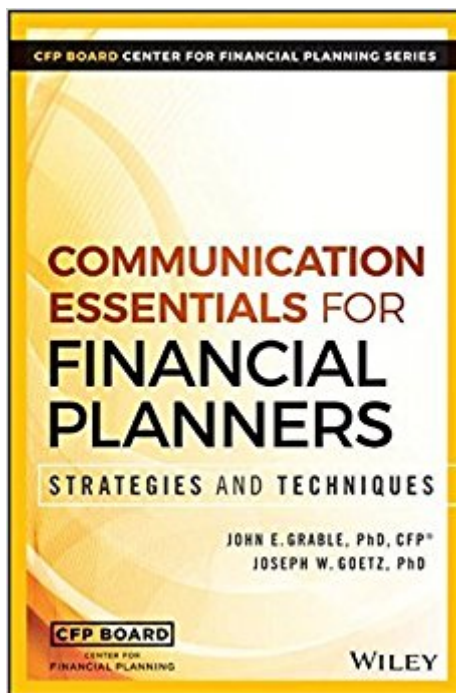




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Communication Essentials For Financial Planners: Strategies And Techniques



Synopsis

Exploring the Human Element of Financial Planning Communication Essentials for Financial Planners[®] tackles the counseling side of practice to help financial planners build more productive client relationships. CFP Board's third book and first in the Financial Planning Series, Communication Essentials will help you learn how to relate to clients on a more fundamental level, and go beyond "hearing" their words to really listen and ultimately respond to what they're saying. Expert coverage of body language, active listening, linguistic signals, and more, all based upon academic theory. There is also an accompanied set of videos that showcase both good and bad communication and counseling within a financial planning context. By merging written and experiential learning supplemented by practice assignments, this book provides an ideal resource for any client-facing financial professional as well as any student on their pathway to CFP[®] certification. Counseling is a central part of a financial planner's practice, and attention to interpersonal communication goes a long way toward progressing in the field; this guide provides practical instruction on the proven techniques that make a good financial planner great. Build client relationships based on honesty and trust Learn to read body language and the words not spoken Master the art of active listening to help your clients feel heard Tailor your communications to suit the individual client's needs The modern financial planning practice is more than just mathematics and statistical analysis—at its heart, it is based on trust, communication, and commitment. While interpersonal skills have always been a critical ingredient for success, only recently has this aspect been given the weight it deserves with its incorporation into the certification process. Communication Essentials for Financial Planners[®] provides gold-standard guidance for certification and beyond.

Book Information

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Numbers, graphs and illustrations, and dependable formulas aren't the only tools a financial planner needs. Research now shows, to be successful and grow your business, advisors first need critical information from their clients and prospective clients—and it's not a simple matter of reading a chart. *Communication Essentials for Financial Planners* is the authoritative, highly-focused guide to enhancing the way you interact and counsel clients to be a more effective financial planner. Without a clearly defined methodology for using questions, feedback, and reassurance to uncover clients' true financial needs, advisors run a high risk of ineffectually serving clients and inevitably losing business. Specifically written to align with CFP Board's Job Tasks Domain, this comprehensive resource ensures you're prepared to satisfy the interpersonal skills requirements of CFP® certification. Professionals will particularly benefit from the second part of the book—even if you consider yourself a good communicator—due to its in-depth examination of the tools and techniques proven to be most effective by the top communicators practicing today. This complete training package goes beyond the page to include a website with visual instructional examples of communication behaviors to both emulate and stop doing. With this cornerstone reference in the CFP Board Financial Planning Series, you can:

- See communication through an accessible framework of best practices for interacting with prospective and current clients
- Raise your emotional intelligence and avoid the most common pitfalls of communicating
- Quickly practice the strategies on your own with insight from real-world examples

Communication Essentials for Financial Planners enables you to optimize your role as an advisor by making unquestionable communication part of your routine.

ADD VALUE TO YOUR SERVICES THROUGH STRATEGIC COMMUNICATION AND COUNSELING *Communication Essentials for Financial Planners* is your road map to mastering the human side of financial planning in order to build more productive client relationships. Ultimately your wealth management strategies and investment insight will serve your clients, but before that can happen, you need to relate to them on a fundamental level and go beyond hearing them to listening to what they're saying. Developed by the CFP Board Center for Financial Planning as a supplementary preparation guide for CFP® certification, this book covers the core competencies of communicating as a financial planner along with a full toolbox for applying them to

real-world practice. With the easy-to-use communication and counselling framework inside, you can:

- Actively take control of the honesty and trust levels shared between you and your clients
- Incorporate active listening and reading body language into your everyday interactions
- Choose from a variety of interactive styles to best fit the personalities of individual clients

Communication Essentials for Financial Planners is your unmatched guide to building gold-standard relationships with your financial planning clients.

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