The challenge

"I can do this cheaper somewhere else"

The coaching opportunity

Communicate the value of a financial adviser

ASK

Tell me more about what's important to you when it comes to investing.

LISTEN

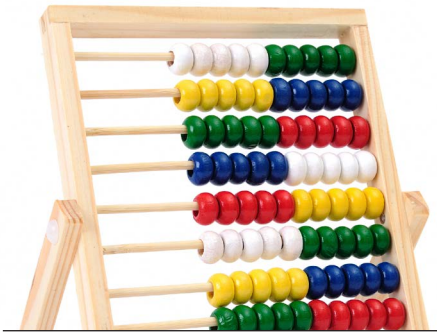
In addition to listening to the client's words, watch their non-verbal cues as they speak to get additional clues about how they are feeling. That will help you empathize and coach more effectively. Resist the urge to interrupt—let the client speak their current truth.

EMPATHISE

Thank you for sharing with me what's most important to you when it comes to investing. Those are important priorities.

COACH

I have often found in working with clients that when it comes to investing, they value having a trusted sounding board, an expert who can help them get crystal clear on their priorities and stay true to them, even when everything feels confusing or worrisome—or even when things feel very clear and obvious. They often rely on me to help guide them away from making emotional decisions. They realise it's not about how their funds or portfolios perform; rather, it's about how they themselves perform. They recognise that excessive greed in a late stage bull market and excessive fear in a bear market typically act as obstacles to long-term wealth creation. I would be honoured to play that role for you, too and believe that we can make great headway in helping you and your family achieve your long-term goals by going through a disciplined wealth management process.



Reinforce the coaching opportunity with additional messaging

"I can do this cheaper somewhere else"

The true definition of wealth is money that serves you. I am a wealth manager not a portfolio manager.

I bring to the forefront risk management and asset allocation and aim to remove the emotional bias you feel towards fear and greed and empower you to stick with your financial plan through full market cycles.

As a wealth manager, I aim to provide experience, insights and wisdom not just facts and information.

Most investors today are drowning in information but are starved for wisdom. I/we are here to help provide wisdom, experience and confidence.

Understand the difference between a client and a customer. One is about doing business and the other is about building a business. You are my client, not my customer.

I want to help you avoid performance chasing and be in the business of managing real-life financial outcomes. That means saving clients from their own worst instincts.

You hired me to be a long-term financial planner and coach, not a short-term market timer.

Be your clients' coach, guide and guru

Recent market volatility has likely created anxiety among investors and can lead a client to question some of the basic tenants of investing and potentially have great impact on their financial success. Financial advisers who **coach** clients on the timeless concepts like maintaining a long-term investment horizon, understanding the realities of market cycles and share the value they bring to the relationship can turn challenging conversations into business growth opportunities. Getting to the top of your profession and staying there is about **guiding** your clients and being a **guru** in managing client relationships and client expectations.

We are here to help you

Russell Investments has partnered with advisers globally for over 20 years to help them build thriving practices—through all types of market environments. We are here for you today, too. Connect with your dedicated Russell Investments regional manager to learn more about how we can help you and your clients navigate through uncertainty.
Please contact us at
Sydney 02 9229 5111
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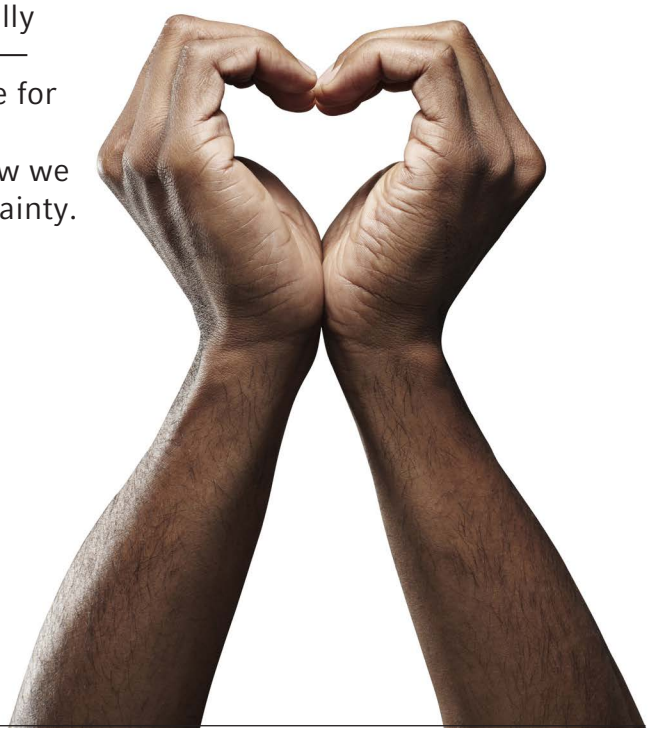
or visit **russellinvestments.com.au**



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