

Video Insight - Anxiety and Fear

A lot of clients have anxiety about money. What it will do to their family unit. What it will do to their perception by their community members, taking them out of somewhere that they've known in terms of their community or their family and it's hard for them to understand where that anxiety is. And talking with them and trying to understand what issues are going into that is something that not every advisor can do.

It's more about the dollars and cents or the cash flow. If you can push past that and really try to understand what clients are feeling and how to move them past that, and it might be that you can talk more honestly with one of the spouses about that because one may be more inclined to talk about it than the other, but you have to find your way to be able to get deeper with them.

And that's how you show true value. And they know that you're there for them as a person and not just there to manage their money