How Behavioral Finance can Assist the Wealth Manager in Building Rewarding Client Relationships

Time: 60- 90 minutes

The Three Lessons

Lesson One - Know Yourself and Know your Client - Be your own Ally

Know your/their Emotions
Know your/ their Cognitive Biases
Know the influence of your/their Social Background
Know the influence of your/their Personality
Know their Values, Goals and Dreams

Lesson Two – Protect Yourself and Protect your Client - Make Science your Ally

Know the Science of Financial Markets and Financial Planning
Know the Science of Human Behavior and Neuroscience

Lesson Three - Protect Yourself and Protect your Client - Be your Client's Ally

Good Wealth Managers are like Good Coaches or Good Medical Doctors
Train your clients and Educate your clients
Promote their Wealth and Well-being

Accredited with one CPD point for FPI members.