



The Whole Brain Wealth Manager

**Come to grips with your own unique brain profile,
understand the unique thinking preferences of your clients
and
avoid misunderstanding using this information effectively in communication.**

This Workshop will:

- assist the Wealth Manager to “**understand how whole brain communication, decision making, problem solving and implementation can contribute to, and strengthen the trusted relationship between the client and the wealth manager**”.
- **provide guidelines to the most likely behavioral biases influencing financial decision making in each brain dimension.**

Workshop Details

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| Part 1: | 60 Minutes and 10 Minutes for Questions |
| Title: | Come to Grips with your Unique Brain Profile |
| Content: | Attendees will be introduced to the whole brain science – past and present. Left brain and right brain thinking preferences will be explained. Attendees will gain an understanding of their own brain preferences. |

Part 2: 60 Minutes and 10 Minutes for Questions

Title: **The Whole Brain Wealth Manager**

Content: Attendees will built on the knowledge gained in the first session and learn how to become a whole brain communicator; how to use whole brain strategies in decision making and problem solving; and how to use whole brain strategies in financial plan implementation.

Part 3: 60 Minutes and 10 Minutes for Questions

Title: **Using Whole Brain Strategies to Manage Behavioural Biases and Establish Trust**

Content: Attendees will review the twenty most common irrational investor behavior biases that wealth managers are likely to encounter with their clients during financial planning. These biases will also be linked to possible brain dimensions and strategies how to deal with each bias the whole brain way will be shared.

Presenter will be Gerda van der Linde, certified whole brain practitioner and qualified to use the Neethling Brain Instrument . Gerda van der Linde is also the Executive Director and Senior Research Officer with the Institute of Behavioral Finance.