

## Motivating Clients to Take Action: Helping Clients Overcome their Financial Fears

**Program Deliverables:** Provide advisors with the knowledge needed to understand and interpret clients' resistance to advice and action. Provide sample scripts of how advisors can motivate clients to move beyond their fears and begin taking action.

### Program Description

Unquestionably, financial advising is a relationship business. Beyond mastering the essentials of investment management and financial planning, financial advisors must be able to "advise" people - - people who have experiences, perceptions, and reactions that influence how they think, respond, and behave.

Drawing upon his training and experience as a licensed psychologist, Dr. Jensen provides you with a crash course in understanding and influencing client behavior. Improve your ability to communicate with tough clients and break through the resistance that prevents clients from embracing and acting upon your advice. You will learn to:

- Better interpret and respond to client reactions
- Alter client perceptions and behavior
- Present advice through the language of opportunity
- Motivate clients to move beyond their fears and to take action

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## Dr. Rick Jensen



Dr. Rick Jensen is a world-renowned performance coach, sport psychologist, and author. In golf, his clients include more than 50 touring pros on the PGA, LPGA and Champions Tours who have combined to win over 200 tour victories and 33 major championships. Dr. Jensen has also trained tennis champions including winners of all four Grand Slam championships.

In the world of financial services, Dr. Jensen has consulted with top firms including Merrill Lynch, Morgan Stanley, UBS, LPL, and Wells Fargo. He has coached hundreds of financial advising teams and trained management at all levels.

Dr. Jensen is the author of *Drive to the Top: 5 Timeless Business Lessons Learned from Golf's Greatest Champions* and *Easier Said Than Done: The Undeniable, Tour-Tested Truths You Must Know (and Apply) to Finally Play to Your Potential on the Golf Course*. He has been featured on ABC, ESPN, CNN, and the Golf Channel, and is also a contributing writer for Golf Digest and GOLF Magazine.