

Building Client Trust through Behavioral Modeling



Why do some client relationships progress better than others?
Are there certain types of clients that you just can't seem to connect with?

Earn CE credit*

Learn how to adapt personal behavior to build credibility and create client trust quickly.

Together we explore how to:

- ✓ Recognize the different behavioral styles and how they affect client trust
- ✓ Know the built in biases and strengths of your style
- ✓ Use observation and effective questions to determine behavioral styles of a new client
- ✓ Learn techniques for aligning your behaviors to support your clients' style needs
- ✓ Understand how clients of each behavioral style set goals and make financial decisions

Call 972-208-0577 for more information
www.TransitionsForLife.com

Workshop Description

This live 1-hour workshop is an interactive, educational presentation of the behavioral modeling concept.

The facilitator uses humor and real-world examples of relationship “raspberries” to engage the audience and shift perspectives. Participants will be encouraged to provide examples of their own behavioral style challenges.

Participants will learn techniques for assessing behavioral styles of themselves and others.

Participants will leave the workshop with a greater confidence in their ability to create more cooperative and productive relationships, and to avoid costly misunderstandings and conflict.

*** This workshop meets the requirements of the CFP® Board of Standards for 1 hour of continuing education credit. Program ID# TFL2142004**

Presented by:

Performance Coach Teresa Pool

Teresa Pool is the President and owner of Transitions for Life. She specializes in re-energizing careers and creating success through transformational change.



"My relationship with Teresa Pool has served to help me identify and overcome obstacles that I was oblivious to and that had actually held me back in the past. I have a clearer, more defined values-approach toward my clientele that dramatically increased not only my production but also my relationships with clients."

Keith Chapman, Chapman Wealth Management