

Strengthen Client Trust: Integrate Money Motives Into Their Financial Plan

Handout for Philadelphia FPA, May 2012

- Money Motives Integration
- But I'm a Numbers Person
 - ET - allies, not _____.
 - UFO _____ for increasing trust
 - SMOGS - the 4 basic emotions
- Mindful = A _____ + A _____
- "You don't have to be a therapist to _____"
- 8 Money Motives /Desires
(MAP: Motivated Asset Pattern)
 1. Prestige
 2. Spontaneity
 3. Peace
 4. Simplicity
 5. Virtue
 6. Security
 7. Control
 8. Growth
- Ask clients where they fit on the spectrum (**See worksheet**)
 - Dominant desired motive (results) when making:
 - Spending decisions
 - Investing decisions
 - General decisions
 - Ask about common ET's (Emotions & Thoughts)
 - TWEDY:
- Behavioral Motivators
 - Motive - Avoid - Drive
 - Prestige (example)
 - Motive Prestige/Image
 - Avoids Mediocrity
 - Drives achievement + _____
 - Goal = Electrify not Electr _____
 - Discover what clients have been _____ on!
 - In stormy times, be the lightning for:
 - Appreciative & Cooperative Clients
 - Save time, Gain greater % of client business

