Communication Essentials for Financial Planners: Strategies and Techniques
John E. Grable, Joseph W. Goetz

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DESCRIPTION

Exploring the Human Element of Financial Planning

Communication Essentials for Financial Planners tackles the counseling side of practice to help financial planners build more productive client relationships. CFP Board’s third book and first in the Financial Planning Series, Communication Essentials will help you learn how to relate to clients on a more fundamental level, and go beyond "hearing" their words to really listen and ultimately respond to what they're saying. Expert coverage of body language, active listening, linguistic signals, and more, all based upon academic theory. There is also an accompanied set of videos that showcase both good and bad communication and counseling within a financial planning context. By merging written and experiential learning supplemented by practice assignments, this book provides an ideal resource for any client-facing financial professional as well as any student on their pathway to CFP® certification.

Counseling is a central part of a financial planner’s practice, and attention to interpersonal communication goes a long way toward progressing in the field; this guide provides practical instruction on the proven techniques that make a good financial planner great.

• Build client relationships based on honesty and trust
• Learn to read body language and the words not spoken
• Master the art of active listening to help your clients feel heard
• Tailor your communications to suit the individual client's needs
The modern financial planning practice is more than just mathematics and statistical analysis—at its heart, it is based on trust, communication, and commitment. While interpersonal skills have always been a critical ingredient for success, only recently has this aspect been given the weight it deserves with its incorporation into the certification process. Communication Essentials for Financial Planners provides gold-standard guidance for certification and beyond.

 ABOUT THE AUTHOR

JOHN E. GRABLE, P HD, CFP®, holds an Athletic Association Endowed Professorship at the University of Georgia (UGA), where he conducts research and teaches financial planning.

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