

SAY THIS, NOT THAT

What you say to your clients is just as important as what you don't say. We highlight common words and phrases used in financial services and present alternatives based on research with clients and language expertise.*



SAY THIS

Build the life you want

Financial future or foundation

Education, access, and opportunity

Customized and reliable service

Roadmap or strategy

People

Live life on your terms

Commitment

A way up

Guidance

Strategies, services, and solutions

NOT THAT



Live a fulfilling life

Financial legacy

The American dream

White glove or concierge service

Plan

Individuals

Make the most of your time

Mission

A way out

Advice

Products

* "The High Costs of Senior Caregiving," Kiplinger, August 2023



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Start the conversation.

Ask your wholesaler for other materials from this series, including “14 Phrases for 2024” and our “Language of the Customer” presentation.

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