



# 14 Key Phrases for 2025



Language is always evolving, but the need to effectively connect and communicate with clients is unchanging. We conducted consumer research, testing words and messages, to better prepare you for more meaningful conversations in uncertain times.\*

- 1 Understanding where you ARE ... to get you where you want to GO
- 2 Building a better financial foundation
- 3 A happier and healthier financial future
- 4 A system that is more approachable and accessible
- 5 More Main Street, less Wall Street
- 6 Small, simple steps
- 7 Financial education, access, and opportunity
- 8 Simple, streamlined, and straightforward
- 9 Meeting people where they are
- 10 Personalized strategies, services, and solutions
- 11 Convenience and connectivity
- 12 Financial control, freedom, and flexibility
- 13 Access to tools, training, and resources
- 14 More choice. More control.

\* "Middle Market Memorandum," Benjamin Clarke Consulting, March 2024

# Putting it into practice

The phrases we've shared can help you show your clients that you care, that you're qualified, and that you "get" them. The research-based value prop below helps bring elements of the phrases together in a simple way to use in your day-to-day conversations. It tested extremely well, and the highlighted portions are the phrases that people were particularly drawn to.

Finances and financial planning can be frustrating. We get it. While it's good to start early, it's important to remember... **there's no such thing as starting too late.**

**There are always small, simple steps** that can put you on a path to **financial freedom.**

## Start the conversation.

Ask your wholesaler for other materials from this series, including "*Say This, Not That*" and our "*Language of the Customer*" presentation.



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