The Trusted Advisor

Client communication strategy

Guiding clients in the age of financial misinformation

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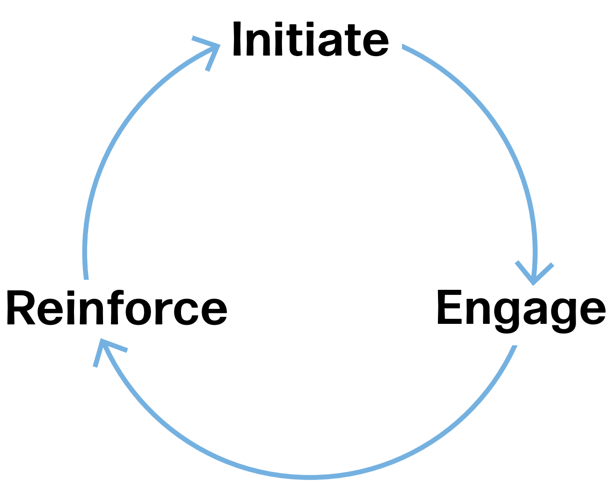
The
Trusted
Advisor

The communication challenge for advisors

Clients today are inundated with financial misinformation from social media influencers, news outlets, and personal networks. To prevent the spread of misinformation, advisors must proactively manage client perceptions, clarify misconceptions, and reinforce their role as trusted professionals. This guide introduces the **Advisor Trust Framework**, a three-stage framework for instilling trust in your client relationships.

Introducing the Advisor Trust Framework



The Advisor Trust Framework is designed to help advisors build confidence, prevent misinformation, and strengthen client relationships. By structuring client interactions around three key stages – **Initiate, Engage,** and **Reinforce** – advisors can create a communication strategy that consistently builds trust.

Initiate

Owning the narrative as a Trusted Advisor

As a Trusted Advisor, you play a critical role in shaping how clients interpret financial information. Rather than letting misinformation dictate the conversation, you have the opportunity and the responsibility to take the lead, proactively setting the narrative through corporate messaging, outreach, and targeted education. By positioning yourself as the go-to source for financial truth, you help clients cut through the noise and make informed, confident decisions.

How to own the narrative

- **Leverage corporate campaigns and industry messaging**

  Stay informed about research, reports, and campaigns that set the broader industry narrative.

  "You might have seen our latest inflation report. Let's talk about what that means for you."

- **Set the tone through proactive outreach**

  Use newsletters, webinars, and pre-meeting content to establish your position as a Trusted Advisor.

  "I'd like to share our latest market update ahead of our upcoming quarterly review. We'll discuss how the markets may impact our long-term planning strategy."

- **Recognize where clients are getting their information**

  Frame conversations based on a client's trusted sources, such as social media, news outlets, or personal networks.

  "A lot of FinTok has been speculating about a market correction. Have you seen anything that's making you uneasy? Let's break it down and see what actually applies to your portfolio."

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Engage

Leading client conversations with confidence

Every client interaction is an opportunity to reinforce trust. Instead of waiting for concerns or misinformation to surface, Trusted Advisors take the lead, structuring meetings to proactively address key issues, and guide clients toward informed financial decisions. Using framing techniques, active listening, and open-ended questions, advisors can create conversations that strengthen client confidence and deepen long-term relationships.

How to build engagement

- **Set a trust-building agenda for client meetings**

  Define key topics in advance to ensure clients leave with clarity and confidence.

  "For today's meeting, I'd like to go over how your portfolio is positioned for the next 12 months and address any concerns you have seen in the news."

- **Use framing techniques to encourage open dialogue**

  Replace reactive corrections with open-ended questions and guided discussions.

  Instead of "That's not how it works," say "That's a great point. Let's walk through what the data shows."

- **Make it a two-way conversation**

  Clients trust advisors who listen and engage.

  "Before we dive in, what's been on your mind regarding the markets lately?"

Reinforce

Designing pathways for ongoing client communication

Trust is built through repetition and consistency. Trusted Advisors reinforce key messages by designing structured communication pathways. By creating sustainable systems that incorporate real-world data and client-specific insights, advisors can become their clients' source of truth. Below are examples showing how these pathways can strengthen trust.

Become your clients' source of truth

- **"Always on" communication**
  - Put clients' minds at ease by warning against the latest scams and financial misinformation
  - Demonstrate your clients are top of mind with proactive check-ins, especially during market shifts or major life events
- **Make meetings meaningful**
  - Gain an understanding of what clients are hearing and from what sources
  - Show empathy and encourage open dialogue
- **Set the record straight**
  - Provide tailored advice with context, and use market data and behavioral finance concepts to cut through the noise
  - Encourage clients to share information with family and friends to build an informed community

Actionable ideas advisors can implement today

- **Host an *Ask Me Anything* webinar on trending financial topics.**
  Address client concerns proactively and provide clarity on common market misconceptions before misinformation spreads.

- **Start client meetings by opening the door for market concerns.**
  "Before we dive in, is there anything on your mind about the markets or your portfolio?"

- **Send a pre-meeting email that sets expectations and frames key financial discussions.**
  "Ahead of our meeting, I wanted to share a few insights on market trends and long-term strategy. Looking forward to discussing how they apply to your portfolio."

- **Follow up post-meeting with a trust-reinforcing summary email.**
  "Great speaking today! As we discussed, your financial plan remains on course despite recent headlines. Here's a recap of our key points and next steps..."

Help your clients make trusted and informed decisions, so they can live their best lives today and tomorrow.

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