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How to Get Clients to Take Action Now

Program Description

When faced with a complicated or challenging decision for which we cannot find an immediate and satisfying answer, people use heuristics. Heuristics are mental shortcuts that allow us to answer a simpler question instead. People inadvertently use heuristics such as loss aversion and anchoring when making decisions. These shortcuts often disrupt rational decision-making and prevent investors from taking action.

This program explores how these kinds of dynamics interfere with good decision-making and offers direction on managing the effects of heuristics and natural biases. We offer a six-step approach designed to help your clients maintain a logical mindset toward investing.

Topics include:

- Heuristics and their role in decision-making
- How to motivate clients to act
- A simple, six-step model that helps organize a presentation's flow and maximize its response potential

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