

Understanding Your Clients "The Psychological Perspective"



Carol Yip

Founder and CEO
of Abacus For Money
The Abacus Academy
Author of
'Smart Money-User'
& 'Money Rules'



5 CE
Points

Date : 24 October 2008 (Friday)
Time : 2.30pm - 6.00pm (Registration 2.00pm)
Venue: Ipoh City & Country Club, Mezzanine Floor
Fee : RM 50 (Member), RM 60 (Non-Member)

Seminar Objective

This seminar will cover in greater details of Topic 1.6 Effective Communication in Clients, which is part of the Module 1 Foundation in Financial Planning. The participants will learn the effective techniques to enhance their skills as an emphatic financial planner who understands the client's financial aspiration in life. The take-home value for the participants will be an increase of his or her appreciation of interpersonal relationships through understanding the aids and barriers involved in the fact finding process and equip the participants with a deeper understanding of the process and the skills necessary to enhance interpersonal relationships with clients by:

- ★ Helping clients finds their life purpose, roles and financial responsibilities.
- ★ Finding clients' life values and belief to achieve financial harmony with self and others.
- ★ Weaving clients' life values, beliefs, life purpose, roles and financial responsibilities into a meaningful financial planning process.
- ★ Helping clients to do a reality check of current financial situation, future financial possibilities and limitations.

Why You Should Attend

This seminar is about self-discovery for the Financial Planner to understand that each client is unique with certain behavior and thoughts towards taking ownership of his or her financial life when he or she attends to the client to formulate the financial objectives of the financial plan.

A person's psychological self is an integral part of the behavior and it influences the way we think and feel about money and it is important for the Financial Planner to have the skills and abilities to understand the client's life perspective, so that they are able to engage the client to take ownership in the financial planning process.