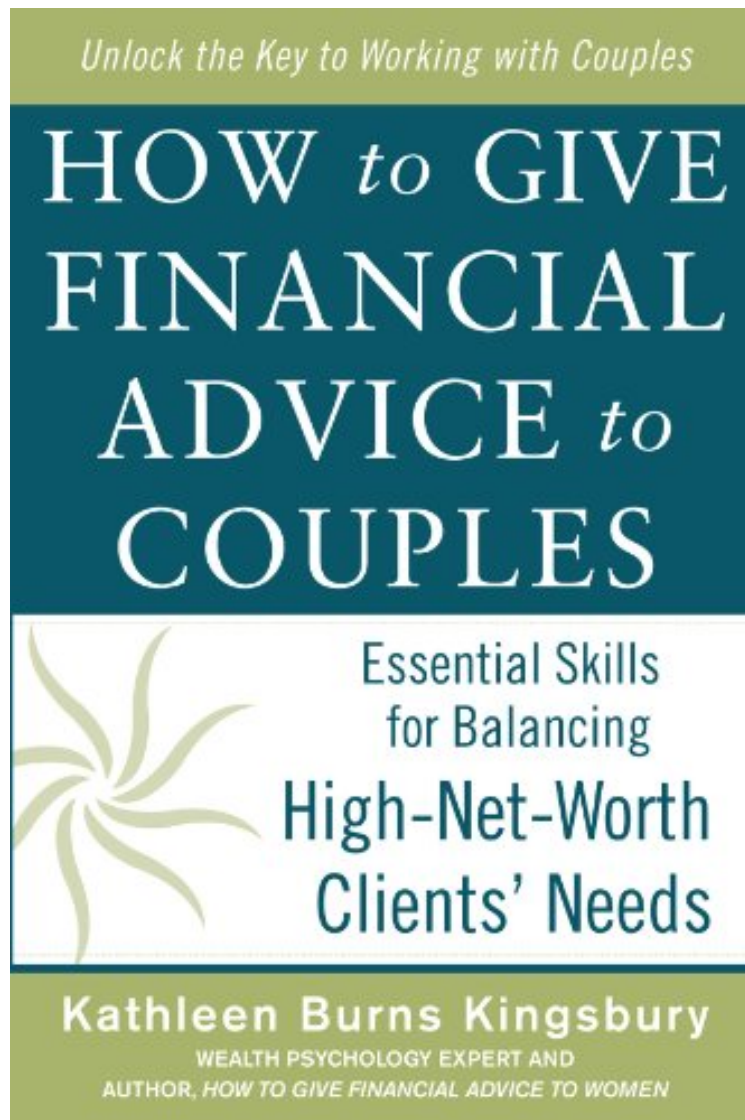


(Pdf free) How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs

How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs

Kathleen Burns Kingsbury

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Kathleen Burns Kingsbury : How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs before purchasing it in order to gauge whether or not it would be worth my time, and all praised How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs:

2 of 2 people found the following review helpful. A fresh look at the couple's dynamicBy Daniel SerraI think Kathleen does a great job presenting the latest research on how couples behave financially and how advisors should be prepared

to effectively work with them, then offers useful exercises to help advisors fine-tune their client relationship skills. If you already practice Life Planning, the skills will sound familiar. As an advisor who works with couples and is a trained mediator, I was aware of much of the information presented because I follow it every day, but for those young advisors who need a lesson in couple dynamics, this is a must read and great to have on your shelf for reference. I found the exercises the best part of the book to both bring out awareness on personal style and to help couples see their financial journey in a better light. Kathleen also has a nice writing style that makes this an easy read -- with detail but still flowing personal insight.

0 of 0 people found the following review helpful. Indispensable Resource for Financial Advisors
By marguerita m cheng
Kathleen Burns Kingsbury shares practical and easy to implement strategies to help financial advisors better connect, communicate and collaborate with female prospects and clients. As an avid reader, I definitely appreciate her seamless transitions to new topics/subject matter. She has done an outstanding job with the organization and flow. Not only is Kathleen an engaging writer, she is also a dynamic speaker. After reading her first book "How to Give Financial Advice to Couples: Essential Skills for Attracting Retaining High Net Worth Female Clients", I invited her to deliver the closing presentation at the 2014 Educational Symposium for the Financial Planning Association of the National Capital Area (FPA NCA). The feedback from our members was overwhelmingly positive. Kathleen can engage, entertain and educate her audience. You will thoroughly enjoy her communication style. Her books are indispensable resources for financial advisors committed to attracting and retaining female clients.

Marguerita M. Cheng, CFP®; Chief Executive Officer
Blue Ocean Global Wealth
2 of 2 people found the following review helpful. An Eloquent Writer with Outstanding Advice
By Laurie Ann Murabito
One of the best books I've read. Kathleen Burns Kingsbury is a talented writer with great advice for financial planners. Her real life examples make her tips easy to understand and implement. Twelve chapters to help you understand the psychology of couples and how the current way of focusing only on the man does not work today. The second part of the book is jam packed with tips on how to become a couple friendly advisor. Your clients will thank you with their accounts and referrals.
Laurie-Ann Murabito, Author of Rethink Leadership: 4 Lessons To Make You Remarkable

DISCOVER the SECRETS to ATTRACTING and RETAINING AFFLUENT COUPLES There is audio or video content present in this Kindle file or a web site referred to by it that cannot be played on Kindle e-ink devices. Fact: A startling 70 percent of widows fire the couple's financial advisor within one year of the death of their spouse--the main reason being that the advisor had failed to develop a trusting relationship with both partners. You can be the exception by developing the essential skills needed to be a couple-friendly advisor. And Kathleen Burns Kingsbury, a leading wealth psychology expert, shows you exactly how to develop these skills. *How to Give Financial Advice to Couples* teaches you how to avoid common traps like subtly siding with one member of the couple, failing to plan adequately with both partners, and sidestepping difficult financial conversations for fear of upsetting the wealth creator. A leading wealth psychology expert, Kathleen Burns Kingsbury reveals everything you need to know about the psychology of couples in order to serve them better. Along the way, she offers specific tips and techniques for managing the challenges inherent in advising traditional and nontraditional couples. Kingsbury reveals: The top myths about couples and money The five tenets of couple dynamics and how they unfold in your office Strategies for encouraging the nondominant partner to speak up in meetings Techniques for facilitating financial conversations and mediating differences Tips for empowering couples to raise financially intelligent children You'll learn how to develop and articulate your couple's philosophy to establish expertise and credibility, how your couple's mindset impacts your work, and how being a couple-friendly advisor will set you apart from the competition. This one-of-a-kind handbook is the key to unlocking the secrets to attracting and retaining high-net-worth couples now and after difficult life transitions. *How to Give Financial Advice to Couples* gives you the expert insight and proven tools for navigating the unique dynamics of two people planning for their financial future. "Why do 70 percent of widows fire their financial advisor upon the passing of their husbands? Kathleen Burns Kingsbury provides the answer. Providing financial advice to couples is a primary skill that has been overlooked in this profession for too long. Whether or not you hearken to Kathleen's insights will have a profound impact on your business, for better or for worse, for richer or for poorer." -- Mitch Anthony, author of *The New Retirement* "A must-read text for financial advisors to help them build and grow their practices. Kingsbury's advice will transform the way you work with your coupled clients, making for more satisfying and prosperous advisory relationships." -- Eleanor Blayney, Consumer Advocate for CFP Board "There are four things we were all taught never to talk about: Sex, Politics, Religion, and Money. When it comes to money, the one place where these conversations MUST happen is in your office. That's why you need to read this book--for its insights into how you can help couples start talking about money!" -- Carl Richards, author of *The Behavior Gap*

From the Back Cover
During the next several decades, women will inherit approximately \$28.7 trillion in assets and will need good financial guidance to manage their increasing wealth. The problem is that two-thirds of women don't trust financial advisors. Even if you are the best at what you do, a female client will pass you over if you can't effectively communicate and establish a trusting relationship with her. "How to Give Financial Advice to Women" is

your one-stop handbook for connecting with affluent female investors. Written by a wealth psychology expert with over 20 years of experience coaching women, this practical book helps you understand the wants and needs of affluent female clients and shows you how to appeal to this group of loyal investors. First, it breaks down the psychological fundamentals of women and wealth, and then it outlines the skill set you need to effectively communicate and advise affluent women. With the help of concrete action steps, in no time at all you will: Refine your advising style to appeal to women Be sensitive to the realities of affluent women's lives Meet the unique needs of women in a variety of life transitions Connect with women both as individuals and as part of couples Build trust, actively listen, and foster financial confidence Help women prepare their children to receive wealth Whether you are a male or female advisor, "How to Give Financial Advice to Women" shows you how the industry has historically made women feel misunderstood and undervalued and gives you everything you need to buck the trend and capitalize on being female friendly. This complete guide even comes with valuable marketing dos and don'ts to ensure you attract the right clients in the most cost-effective way. "How to Give Financial Advice to Women" tells you what every wealthy woman wants her financial advisor to know.

About the Author Kathleen Burns Kingsbury is the founder of KBK Wealth Connection, a wealth psychology expert, and an international speaker. She teaches financial services professionals how to connect, communicate, and collaborate more effectively with their clients to increase client retention and improve profitability. Kingsbury is the author of How to Give Financial Advice to Women and the Creating Wealth from the Inside Out Workbook for clients. For more information, visit www.kbkwealthconnection.com