



Communication Preferences

Financial Transition Life Events are by themselves stressful times that temporarily dilute many of our normal life skills, including communication skills. Yet these are times when we may need to have critical conversations that lead to decisions that will impact us for decades to come.

Personal finance is a very private topic, one we usually do not share with many people in our life outside of our spouse and financial advisor. Because it is private, it is also an infrequent topic and we do not get many opportunities to discover how to have comfortable and productive money conversations.

We all have a preferred style of communicating when we are talking about our money and key commitments. Finance related discussions are more productive and less emotional when we know one another's communication styles. The following exercise is designed to allow you to quickly identify your primary communication preferences when meeting with advisors, receiving information and making decisions.

Please circle the communication preferences you would like me to be aware of and remember. Help me understand how I can help you feel comfortable and productive in meetings. How do you like to receive information and recommendations? And how I can support you when you have decisions to make? Only circle the ones that strongly apply to you.

Encourage my input.	Be an active listener.
Remember my need for control.	Give direct answers; get to the point.
Move quickly to the bottom line.	Offer options so I can decide.
Allow me time to process my response.	Tell me who is involved.
Use logic, summaries and key points.	Soften the tone of communication.
Slow down the pace of communication.	Look for ways to minimize the risks.
Use graphics and verbal communications.	Remember my need to analyze.
Invest time in building the relationship.	Expect me to ask you to provide facts.
	Do not mistake my lack of response for inattention.

Meetings and phone calls _____

Information and recommendations _____

Decisions _____

Other _____

When you work with me as my Financial Transitionists® please remember my tendency to _____ and my need for _____.

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