

Becoming a Behavioral Advisor; Delivering Superior Portfolio Performance for Your Clients

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Workshop Agenda

Behavioral Advice & You

- Behavioral Advice Conceptual Overview
 - Definition and Components
 - Introduction to Neuroscience and How It Applies
 - Outcome: Understanding Benefits for Advisors & Clients

- Moral Intelligence & Moral Competence
 - Definition and Components
 - Outcome: Applying Integrity, Responsibility, Compassion, & Forgiveness to Your Practice

- Emotional Intelligence & Emotional Competence
 - Definition and Components
 - Review Emotional Quotient Inventory Results
 - Outcome: Understanding How Emotions Impact Decisions

- The Alignment Model Overview
 - Frame 1 - Ideal Self, Frame 2 - Goals, Frame 3 - Real Self
 - Outcome: Defining What is Most Important to Advisors & Clients, Aligning Values with Goals/Wants and Actions

- Psychological Phenomena that Lead to Decision-Making Mistakes
 - Biases, Heuristics, Framing Effects
 - Outcome: Understanding How Biases Affect Decisions

- The 4 R's of Competency Development
 - Recognize, Reflect, Reframe, Respond
 - Outcome: Implementing the 4 R's into Your Practice