

MANAGING THROUGH VOLATILITY



HAVING EFFECTIVE CLIENT CONVERSATIONS IN AN UNCERTAIN ENVIRONMENT

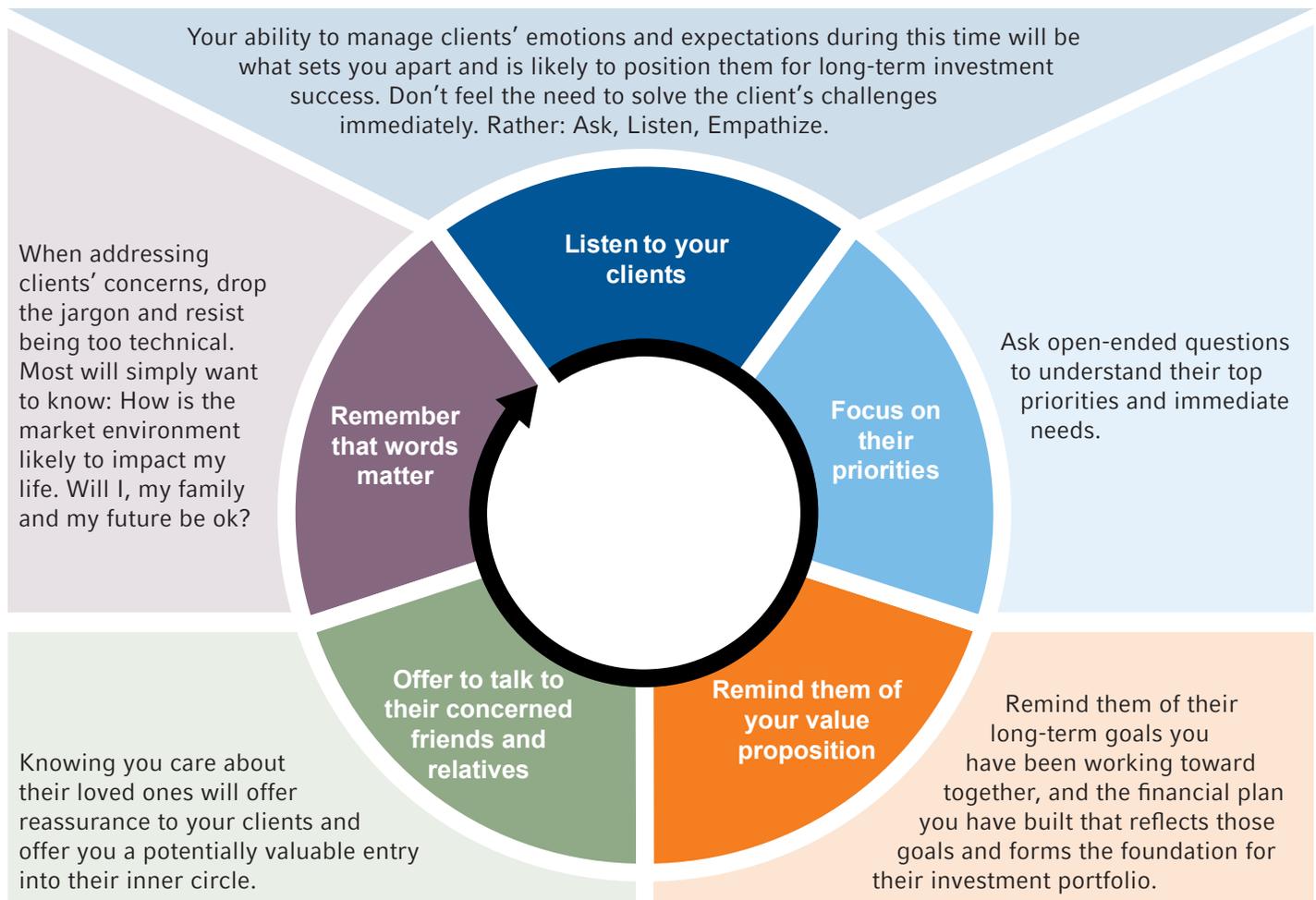
How can you best engage your clients?

No matter how much you prepare clients for market volatility, it typically comes as a surprise and sparks a roller coaster of emotions. Consider these client engagement **best practices and resources to navigate the current environment** toward deeper and more trusting relationships with your clients.

Authentically: Ask, Listen and Empathize

When navigating uncertain environments—particularly one like today that is affecting every aspect of people’s lives—many clients simply want to have human, calming, effective conversations with their financial advisor. They want reassurance that you understand their priorities and fears, and that you empathize.

Consider these best practices:



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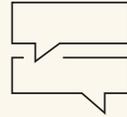
How should I prepare?

A step-by-step approach to gather your thoughts for client conversations focused on the things that matter most to them.



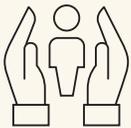
Prepare your message

Draw on your core beliefs as a financial advisor and share them with your clients. When fear is at its highest, consistency can instill reassurance and confidence.



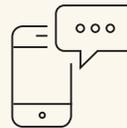
Over communicate that you and your team are here

All team members should make themselves as available to clients as possible during this time of uncertainty. Responsiveness, empathy and authenticity can go a long way in putting clients at ease.



Protect the plan

Ensure that clients' portfolios are still in line with their long-term plans. Portfolio allocations have likely shifted in the recent market volatility. Evaluate if any changes are needed. If all is in order, protect the plan you've created with the client. Making irrational decisions today can have long-lasting negative consequences on the health of a client's wealth. By learning more about client biases and where they are on the roller coaster of emotions, you can help the client stay focused on how and why investment decisions were made in the first place.



Embrace technology

Virtual conversations are much more impactful if you can observe the client's body language. Embrace technology that allows you to see the client while you are speaking with them.

We are here to help you

Russell Investments has partnered with advisors for over 20 years to help them build thriving practices—through all types of market environments. We are here for you today, too. Connect with your dedicated Russell Investments regional team to learn more about how we can help you and your clients navigate through uncertainty. Please contact us at 888.509.1792 or visit russellinvestments.com/ca

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