

Coaching Tips Video Scripts

Describer: Title, Tips 1-8, Coaching techniques to enhance client discovery

Female Voiceover: In the next Frontier of Advice, these tips can help advisors uncover the keys to client fulfillment and well-being.

Describer: Tip #1, display of question mark icon and icon of ear on green grass-like background. Image with 3 people talking with brochures on desktop. word display: EXPLORE

Female Voiceover: Coaching tip #1

Ask your clients for permission to explore priorities beyond finances. It opens the door to understanding other important aspects of your client's life that are part of their life plan.

Describer: Tip #2, display of question mark icon and icon of ear on green grass-like background. Word display: AFFIRM over image of 2 females talking.

Female Voiceover: Coaching tip #2:

Begin by affirming the client's position – acknowledging their life concerns and areas of focus. Use validating statements to increase comfort and help convey empathy.

Describer: Tip #3, display of question mark icon and icon of ear on green grass-like background. Word display: REFRAME over image of a male smiling.

Female Voiceover: Coaching tip #3:

Post a question that could lead to a new consideration. Help your clients see situations and assumptions through a new lens.

Describer: Tip #4, display of question mark icon and icon of ear on green grass-like background. Word display: LISTEN over image of 1 male and 1 female talking.

Female Voiceover: Coaching tip #4:

Listen with openness and curiosity, not judgment. Stay focused on the client's feelings without injecting your own.

Describer: Tip #5, display of question mark icon and icon of ear on green grass-like background. Word display: How is That Working for You? Over image of 1 male and 1 female talking.

Female Voiceover: Coaching tip #5:

Ask open-minded questions. The right question can open the door to awareness, understanding, and insight.

Describer: Tip #6 display of question mark icon and icon of ear on green grass-like background. Word display: RECOGNIZE over image of a male and female couple talking over the desk to 1 female talking.

Female Voiceover: Coaching tip #6:

Recognize blocks grounded in fear or limiting beliefs. Encourage and reinforce your client's abilities and resolve to move forward.

Describer: Tip #7 display of question mark icon and icon of ear on green grass-like background. Word display: ACTION over image of 2 males talking over coffee.

Female Voiceover: Coaching tip #7:

Forward the action. Put the ball in the client's court by asking a question that leads to next-steps.

Describer: Tip #8 display of question mark icon and icon of ear on green grass-like background. Image display of a icon of a person walking on a path in the shape of a human face with green grass-like background.

Female Voiceover: Coaching tip #8:

Lead clients to the 'who' and 'why.' Help them to define the purposeful path to their broader life goals and a greater sense of well-being. Learn more by reading our latest white paper; 'The Next Frontier: Conversation, Connection, and Confidence.'

Describer: Image of front cover of brochure by First Clearing, and Ledermark Communications & Coaching, The Next Frontier, Conversation, Connection, and Confidence.

Describer: Words displayed: Are you First Clearing Empowered? First Clearing logo.
Female Voiceover: Are you First Clearing Empowered?

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