

<b>Title:</b>	Matt Oechsli: Changing Investor Expectations – Are you Ready? Elite advisors are phenomenal listeners, and we have taken what elite advisors do and call it the “three C’s of communication.”
<b>Guest:</b>	Podcast clip from Matt Oechsli Episode on The Next Frontier Podcast Matt Oechsli
<b>Describer:</b>	Image of a path in the shape of a person’s face on green background. Image Displayed: Icon of a human ear. C3. Concise, Conversational, Confidence. Asking Questions ???
<b>Voice Over: Matt Oechsli</b>	Elite advisors are phenomenal listeners and, you know, we have taken what elite advisors do and we call it the three Cs of communication. You know, that they're concise. They don't talk too much. They're not long-winded, talking about themselves. They're conversational. They're not arrogant, telling you how great they are, or acting like they have the answer for everything in the world. And they do it with confidence, but a relaxed confidence. And another thing that elite advisors excel in are asking questions. You know, and they understand how to ask questions in a casual conversational tone. Not as an inquisition.
<b>Describer:</b>	Image of a path in the shape of person’s face on green background. Image Displayed: Icon of a human ear.
<b>Voice Over: Matt Oechsli</b>	And then they're good listeners to the response. And by the way, you know, when you listen to somebody answer a question - this is whether it's a client, or you're out there socially interacting with a potential prospect.
<b>Describer:</b>	Image of green background, outline of two human faces. Words Displayed: What do you Do for A Living? Image of US dollar bill with “thought bubbles”.
<b>Voice Over: Matt Oechsli</b>	You know, when a prospect typically asks an advisor, "What do you do for a living?" An advisor then regurgitates their value proposition, which often sounds like the financial pledge of allegiance, because you're trying to come across so smart, so intelligent. This is all counterintuitive, but that's precisely the wrong thing they should do.
<b>Describer:</b>	Green background. Words Displayed: We Handle the Finances for Some Families in the Area. How did you get involved with this fundraiser?
<b>Voice Over: Matt Oechsli</b>	They should just be very humble about it. You know, we handle the finances for some families here in the area. And then they redirect by asking a question to the other individual, you know, such as, "How did you get involved with this fundraiser?" And then they listen to the response.
<b>Describer:</b>	Blue background. Words Displayed: Follow Up Questions, Key to developing rapport and credibility because they signal that... A. You’re Listening B. You’re Hearing C. You’re Interested
<b>Voice Over: Matt Oechsli</b>	And when they listen and then ask a follow-up question, follow-up questions are the key to developing rapport and credibility because they signal that A, you're listening. B, that you care about what you're hearing. And then C, you're interested in hearing more. People like that.
<b>Describer:</b>	Logo for The Next Frontier Podcast Series. Words Displayed: Subscribe to the podcast series on your favorite platform. Icons for: Apple Podcast, Google Play, Stitcher, Libsyn

Disclosures:

Podcasts are created/provided for general information purposes only. The views expressed by non-affiliated guest speakers are their own and do not necessarily reflect the opinion of First Clearing or its affiliates. First Clearing and its affiliates do not endorse any guest speakers or their companies, and therefore give no assurances as to the quality of their products and services.

First Clearing is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. First Clearing provides correspondent services to broker-dealers and registered investment advisors and does not provide services to the general public. © 2021 Wells Fargo Clearing Services, LLC. All rights reserved. CAR-0521-01698