

# Communication Preferences

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



## AGREEMENTS

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**1.** Meetings and phone calls:

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**2.** Information and recommendations:

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**3.** Decisions:

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**4.** Other

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**5.** When you work with me remember my tendency to \_\_\_\_\_

and my need for \_\_\_\_\_

