



COMMUNICATION PREFERENCES

CLIENT: _____ DATE: _____

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 check the communication preferences you would like us to be aware of and remember.

Help us understand how we can help you feel comfortable and productive in meetings.

How do you like to receive information and recommendations? How can we support you when you have decisions to make?

Communication Preferences (Please check all that apply)

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

Preferred Communication Method(s) - Frequency (Please check all that apply)

- | | | | | |
|--------------|----------------------------------|------------------------------------|--|-----------------------------------|
| Email | <input type="checkbox"/> Monthly | <input type="checkbox"/> Quarterly | <input type="checkbox"/> Semi-annually | <input type="checkbox"/> Annually |
| Phone Calls | <input type="checkbox"/> Monthly | <input type="checkbox"/> Quarterly | <input type="checkbox"/> Semi-annually | <input type="checkbox"/> Annually |
| Face to Face | <input type="checkbox"/> Monthly | <input type="checkbox"/> Quarterly | <input type="checkbox"/> Semi-annually | <input type="checkbox"/> Annually |

Comments: