

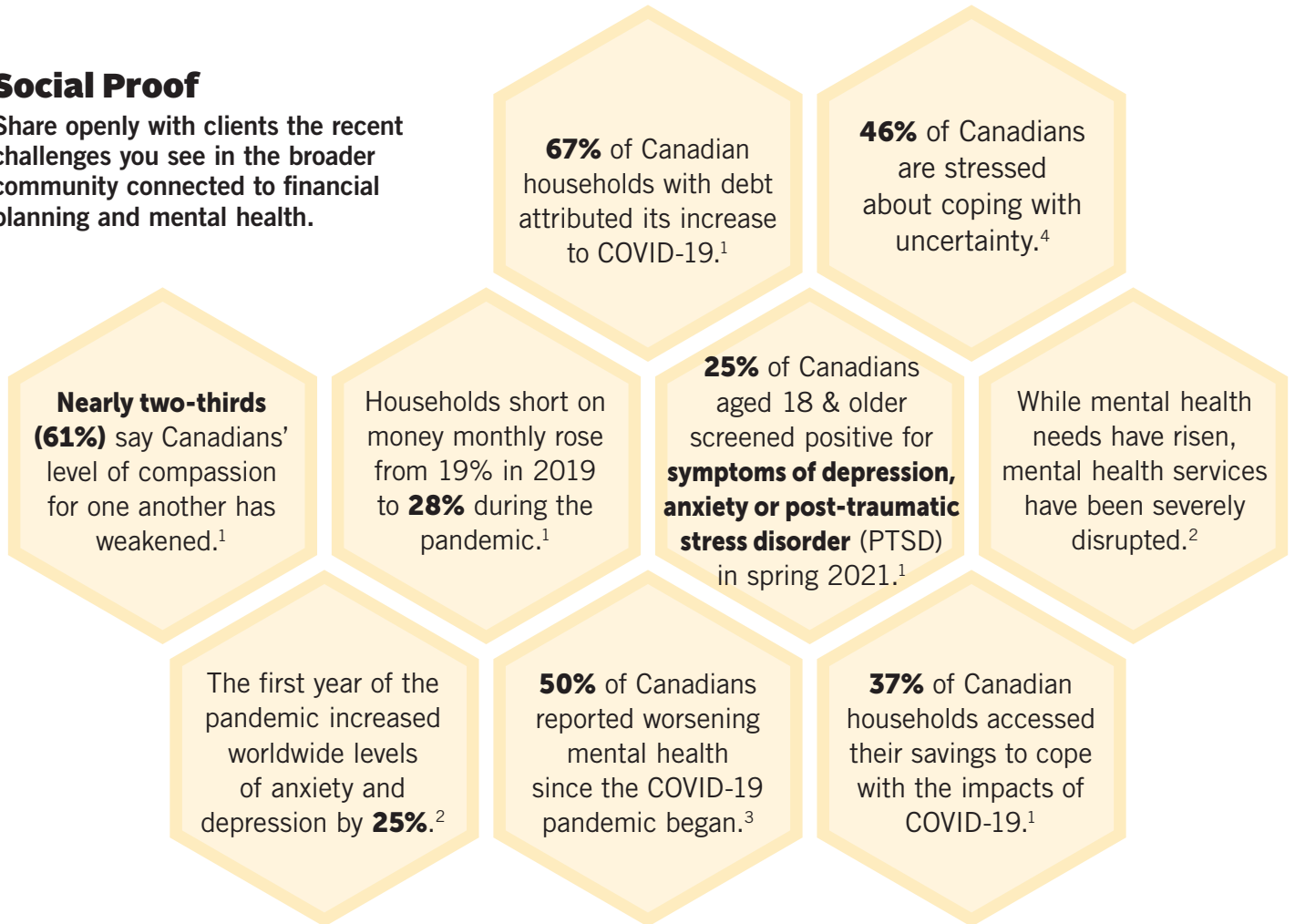


## Connecting to Clients

To obtain the information you need to help a client create or modify their financial plan, sometimes a potentially uncomfortable conversation is necessary. Rather than diving right into what could be challenging questions, it may help start a more meaningful conversation by sharing social proof statements or community-based observations, making it easier for the client to open up about their own struggles or concerns.

### Social Proof

Share openly with clients the recent challenges you see in the broader community connected to financial planning and mental health.



### Asking Questions

After sharing some social proof, it can be easier to transition into questions more specific to your client, setting the stage for a more successful conversation.

*How have you been managing through the pandemic?*

*And how about the people around you?*

*Have you seen any struggles within your family/friend circle?*

*How have you been managing?*

*Did you know that the pandemic has had an extreme effect on Canadians' mental health and finances?*

#### Take Note:

*Those less inclined to talk about themselves may be more inclined to talk about the struggles amongst their family and friends... which may then come back around to their own experience.*

# PROMOTING ADVISOR & INVESTOR WELL-BEING

Watch our Mental Health & The Financial Advice Relationship webinar series for insights, tips and strategies. Visit [bridgehousecanada.com/mental-health](https://bridgehousecanada.com/mental-health).



Canadian Mental  
Health Association  
Toronto

#### Sources:

- 1 Statistics Canada
- 2 World Health Organization
- 3 Public Health Agency of Canada, 2022
- 4 CMHA Ottawa, March 2022

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