

Your Market Volatility T.U.T.O.R.

A five-step guide to deepening the trusted relationships you've established with clients

ADVISOR PRACTICE MANAGEMENT

Every advisor maintains a client communications regimen, but when markets are volatile it's time to ramp things up. If your clients have questions and concerns, seize the opportunity to offer timely information and reassurance that you remain focused on helping them achieve their long-term goals.



Tailor your approach

Use a survey to start the discussion with clients and prospects regarding the frequency, method and type of communications they prefer during times of market volatility. Leverage your contact management system as a business partner to stay organized and focused.



Understand your clients' emotions at the deepest level

Client fear and anxiety surface when markets are volatile. Listen to their concerns, ask clarifying questions and help them overcome destructive emotions and behaviour.



Train clients using all resources at your disposal

Leverage your partners at Mackenzie to gather the educational materials your clients need to help them stay disciplined and focused on the long term.



Outline your process for the immediate future

To keep your clients calm, provide a clear, detailed process of how you and your team will support them and be available during times of market upheaval. Be predictable when times are unpredictable.



Restore client confidence

Build your clients' trust by honouring commitments and highlighting the expert capabilities of your team and network. Show your clients that you value them and their commitment to the long-term plan.

Contact your Mackenzie sales team or [log-in to Mackenzie Institute](#) for more information on Practice Management best practices.