



# No Longer Awkward: Communicating with Clients Through the Toughest Times of Life

*Amy Florian*

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Life transitions put money in motion. Seventy percent of new investments and referrals result from transitions like birth, death, divorce, dementia or serious diagnosis, and retirement.

Thousands of financial professionals compete for this business, touting their skill in investing money, minimizing taxes, utilizing insurance, and coordinating estate planning. Those who succeed in getting the business have one additional skill: they understand the grief triggered by every life transition, and they know what to say and do to effectively support clients through the process. People look for professionals who understand their lives to give them their business.

This kind of training is difficult for professionals to find. Most rely on what they've picked up from others, inadvertently perpetuating mistakes that hurt their clients and their business.

This guidebook is the definitive resource for professionals who work with clients in transition. It is packed with insightful research-based knowledge and practical applications that have a profound impact on clients and professionals alike.

## **Learn:**

- why there are better things to say than “I’m so sorry”
- facts about dementia, signs to look for, and the office protocol to follow
- whether grief is different in men and women
- six common “comfort phrases” to avoid and what to say instead
- emotional differences between divorce and widowhood
- what to do when a client is diagnosed with serious or terminal illness
- what to write in condolence cards, whether to send flowers, and what to say at services
- how to deliver a life insurance benefits check
- and much more.

The knowledge in this book equips professionals to truly serve clients, providing effective support in ways that others don't. The added benefit: serving clients well through the toughest times of life builds long-term loyalty and enthusiastic referrals. It is good for the client, good for professionals, and good for business.

## **What Others Say:**

Amy Florian's book *No Longer Awkward* does one simple thing very well: it helps you to respond sensitively and supportively in situations where a client is grieving. Along the way, she helps us understand why so many of our normal and routine responses can be so insensitive and unhelpful. You will do a better job with your clients by following the suggestions in this book.

- Bob Veres, Editor of *Inside Information*; Columnist for *Financial Planning* magazine.

Amy Florian eloquently describes the life transitions and sources of grief every client experiences. Most

financial professionals don't adequately understand these transitions and are ill-equipped to guide clients through them. Amy's prescriptions in this eminently practical reference guide teach us all what to say (or not say), how to respectfully honor a client's grief, and how to communicate support in a professional yet personal way. Learning the skills in this guide is sure to improve the quality of client relationships and the value clients assign to a firm's services.

- David J. Drucker, President, Sunset Financial Management, Inc; principal at Virtual Office News

All financial advisors must deal with grieving clients. Unfortunately there's never been a guide that really explains what to say, what not to say, and how to handle these challenging and professionally awkward situations. Until now. "No Longer Awkward" is an incredible and incredibly practical resource for working with grieving clients, and should be required reading for every financial advisor!

- Michael Kitces, Partner and Director of Research for Pinnacle Advisory Group, and publisher of the financial planning industry blog Nerd's Eye View

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