



How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs

Kathleen Burns Kingsbury

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DISCOVER the SECRETS to ATTRACTING and RETAINING AFFLUENT COUPLES

Fact: A startling 70 percent of widows fire the couple's financial advisor within one year of the death of their spouse--the main reason being that the advisor had failed to develop a trusting relationship with both partners.

You can be the exception by developing the essential skills needed to be a couplefriendly advisor. And Kathleen Burns Kingsbury, a leading wealth psychology expert, shows you exactly how to develop these skills.

How to Give Financial Advice to Couples teaches you how to avoid common traps like subtly siding with one member of the couple, failing to plan adequately with both partners, and sidestepping difficult financial conversations for fear of upsetting the wealth creator.

A leading wealth psychology expert, Kathleen Burns Kingsbury reveals everything you need to know about the psychology of couples in order to serve them better. Along the way, she offers specific tips and techniques for managing the challenges inherent in advising traditional and nontraditional couples. Kingsbury reveals:

- The top myths about couples and money
- The five tenets of couple dynamics and how they unfold in your office
- Strategies for encouraging the nondominant partner to speak up in meetings
- Techniques for facilitating financial conversations and mediating differences
- Tips for empowering couples to raise financially intelligent children

You'll learn how to develop and articulate your couple's philosophy to establish expertise and credibility, how your couple's mindset impacts your work, and how being a couple-friendly advisor will set you apart from the competition.

This one-of-a-kind handbook is the key to unlocking the secrets to attracting and retaining high-net-worth couples now and after difficult life transitions.

How to Give Financial Advice to Couples gives you the expert insight and proven tools for navigating the unique dynamics of two people planning for their financial future.

*"Why do 70 percent of widows fire their financial advisor upon the passing of their husbands? Kathleen Burns Kingsbury provides the answer. Providing financial advice to couples is a primary skill that has been overlooked in this profession for too long. Whether or not you hearken to Kathleen's insights will have a profound impact on your business, for better or for worse, for richer or for poorer." -- Mitch Anthony, author of **The New RetireMentality***

"A must-read text for financial advisors to help them build and grow their practices. Kingsbury's advice will transform the way you work with your coupled clients, making for more satisfying and prosperous advisory relationships." -- Eleanor Blayney, Consumer Advocate for CFP Board

"There are four things we were all taught never to talk about: Sex, Politics, Religion, and Money. When it comes to money, the one place where these conversations MUST happen is in your office. That's why you need to read this book--for its insights into how you can help couples start talking about money!" -- Carl Richards, author of **The Behavior Gap**

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Luis Gonzalez:

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