
Life, Invested Conversation Guide

Reshaping the Investment Conversation

Everyday life principles are also sensible investing principles. By reflecting on our life experiences, we can draw parallels between the principles we utilize in our day-to-day decision-making and the principles that underpin a scientific approach to investing.

Use this Conversation Guide to help your clients build an investment philosophy that is relatable, based in science, and helps them put the odds in their favor.

Personal Preparation

Reflect on how you have used these principles to approach situations and navigate decisions in life. Fill out the graph below with stories, analogies, and examples of how these principles play out in your life and in investing.

Principles of Life and Investing

PRINCIPLE	IN MY LIFE...	IN INVESTING...
Uncertainty Creates Opportunity		
Power of Compounding		
Planning over Prediction		
Control What You Can Control		
Value of Flexibility		
Tune Out the Noise		

Guide for Client Conversations

1. **Ask for a story:** “Tell me about a time in your life you’ve dealt with uncertainty.”
2. **Actively listen:** Be engaged and listen attentively.
3. **Reflect on principles:** What were some of the principles you used to navigate that uncertainty?
 - ▶ How did uncertainty create opportunity?
 - ▶ How did you control what you can control?
 - ▶ How did flexibility play a role?
 - ▶ Did you have to tune out the noise?
 - ▶ Did your results reflect taking small, consistent actions toward your long-term goals?
4. **Draw on parallels:** Use the principle you discussed for “In My Life...” to illustrate the investment parallel.
5. **Reinforce the journey:** Share how investing, like life, is a journey. There will be ups and downs, yet following these principles will help provide more peace of mind and allow you to enjoy the ride.

UNITED STATES

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