



Dimensional 4S Framework®
for Effective Client Communication

Value of Advice

A financial professional can bring clarity, objectivity, and efficiency to their client's financial life. An advisor can help keep clients focused on their long-term financial goals and position them well to have a good outcome. Quality financial advice and guidance can profoundly impact a client's financial experience.

SCRIPTS

- It's hard to put a price tag on feeling confident about your financial strategy.
- The value of an advisor goes far beyond investment selection and asset allocation.
- There is value in the time and resources required to manage one's financial life.
- Many investors may find it difficult to remain objective and stay disciplined during volatile markets.
- Fees are only one consideration when selecting a provider of professional advice and guidance.
- Life is unpredictable, but a financial plan doesn't have to be.

STORIES

Why Hire an Advisor?

Hiring an advisor is much like delegating other tasks to specialists—for example, lawn care or housekeeping. Although you may be able to do the work yourself, you can benefit from a professional's knowledge, experience, and attention to detail, and in the process, reclaim precious time for higher-priority activities. Working with an advisor also can make you a more knowledgeable investor, which is comparable to a personal coach helping an elite athlete fine-tune his or her skills and apply discipline in training.

SKETCHES

Managing the Emotions of Investing



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People's emotions are often tied to the market's recent performance, which can lead them to buy high and sell low across time. Instead of this wealth destruction, investors should take a longer-term view of wealth creation. With patience, discipline, quality advice, and guidance, you can go from being an average investor to a transformed one.

SUPPLEMENTS

- [Realizing Your Value with the 4S Framework](#) (article)
- [You Know More Than You Think You Do About Investing](#) (article)
- [Pursuing a Better Investment Experience](#) (signature materials)

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