



Applied Behavioral Finance

Summary of Key Notes

The Investor Psyche

- Our Irrationality is Hardwired & Largely Unconscious
- Emotional Biases
 - Influenced by amygdala and dopamine
- Cognitive Biases
 - Mental shortcuts, pattern detection dominate

Coaching Concepts

- Volatility is Subjective
 - Don't like it → Look less
- Categorize a Loss
 - Temporary or permanent
- Frame the Financial Media
 - Is their information helpful or harmful to achieving your goals?

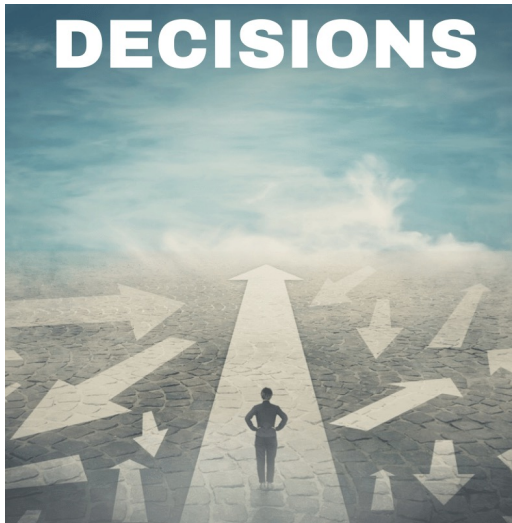
Effective Behavioral Coaching

- Correct Perceptions
 - Teach and reinforce important truths
- Realistic Expectations
 - To help them weather all markets
- Consistently
 - Have a consistent process of sharing

Applying in Advisory Business



- Monthly (2 pieces)
- Content Library (100+)



- Behavioral Policy Stmt
- Decision Checklist



- Be-Fi Questionnaires
- *Speaking Your Client's Language™*

Learn More



- **Complete Be-Fi Solution**
- **See it For Yourself!**
- ← **Schedule Call Today**
 - *Up to 6 weeks in advance*

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