Client Communication & Care

Competency Focus

Builds collaborative client relationships that integrate both technical and human insight to deliver a personalized financial planning experience. This competency supports trust, clear communication, and ongoing engagement that drives meaningful client outcomes.

Sub-Competencies

1. High Impact Communication
2. Client Experience
3. Prioritization
4. Drive for Client Success
5. Financial Coaching
6. Integrates Behavioral Finance
7. Financial Counseling

Proficiency Overview

FOUNDATIONAL

- Builds rapport through empathetic listening and clear messaging
- Clarifies goals and values during early client conversations
- Maintains a consistent communication cadence and meeting structure
- Encourages client ownership and responsibility

INTERMEDIATE

- Uses storytelling and visuals to support client understanding
- Implements a communication plan across the client journey
- Collaboratively sequences client goals and planning activities
- Identifies client barriers and reinforces motivation

ADVANCED

- Customizes communication for personality and scenario
- Enhances client ease with digital solutions and personalized service
- Leads prioritization in complex planning engagements
- Proactively addresses client reluctance and hidden barriers