

The Trusted Adviser Paradox

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As an adviser, your clients' trust is the foundation of your business. While your technical guidance and tactical execution are fundamentals of your practice, enduring client trust is built through your ability to connect deeply with those you advise. In doing so, you increase your value to them by supporting them in opening to new perspectives, identifying the possibility present in a bigger vision, and helping them to define their goals and align their resources to support those goals. It is through this client connection that your role transforms from the commoditized "technical resource" to the highly valued "trusted adviser."

Most business, wealth, and estate advisers are drawn to becoming a trusted adviser to their clients, and rightfully so. Trusted advisers have deeper, more meaningful, more rewarding, and longer-term client relationships than their technically astute but relationally challenged counterparts.¹

Yet, by not honoring their own health as an asset, many advisers sabotage their abil-

ity to become and remain their clients' trusted advisers.

The Paradox

It may seem that the recipe for becoming a trusted adviser to your clients is to be the best at what you do—to have the greatest technical proficiency, be the smartest in the field, have the most respected network of colleagues, and the most unrelenting dedication to those you serve. Those components all have an effect on client trust, but the most important and irreplaceable ingredient? You.

In your best form, your combination of technical expertise, visionary intelligence, tactical execution, inherent wit, and individual wisdom is a differentiator; it sets you apart from everyone else who, to the untrained observer, has exactly the same offering you do.

Feeling foggy-headed from too little sleep or edgy from too much caffeine?

You'll miss the subtle cue that your client is ready to shift his or her thinking from exploration to action, and the opportunity to illustrate your value by appropriately

responding to that cue will be lost.

Show up to a client meeting with your thoughts still spinning on the 17 items on your "to do" list? Your clients know that you have brought only part of yourself to the meeting. If you're not investing time and full attention in them, they are not likely to invest money with you.

Feeling uncomfortable in your own skin? Diminished confidence in your physical or emotional being, for whatever reason, just looks and feels like "lack of

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confidence" to your clients, and you begin to lose their confidence.

The Link Between Health and Client Trust

Physical fatigue, lack of mental clarity, stress exhaustion, and fractured focus

diminish your ability to connect with clients, which is essential to building trust.

By honoring your health as a professional and personal asset, you not only fund a key element to the success and sustainability of your own practice, but you model possibility to your clients and confirm their rightful choice of placing their highest trust in you.

Trusted advisers have an unwavering ability to focus concentrated attention on their clients—despite their own “to do” lists, life demands, and internal frustration of zooming thoughts—and this focused concentration is a differentiating cornerstone of their practice.

Sounds pretty simple—client first, you second. So, what’s the paradox? Physical fatigue, lack of mental clarity, stress exhaustion, and fractured focus diminish your ability to connect with clients. Without an ability to connect deeply and authentically with your clients, you miss the opportunity to bring greater value to the table than your technical expertise, and you lose the capacity to build an enduring and irreplaceable relationship with them.

Bottom line: your ability to focus concentrated attention on your client is significantly diminished, if not destroyed, when you don’t honor your health as a foundational asset of your business.

Put Yourself First ... Then Get Out of the Way

By putting yourself first—meaning that your performance-enhancing self-care practices are ritually a priority in your schedule—you will reduce the attention that your own body and mind demand, and increase your ability to focus solely on your client.

Four Cornerstone Practices for Every Trusted Adviser

1. **A Quiet Mind.** Your ability to focus intently and deeply is critical in a culture that touts multi-tasking and 24-hour accessibility as markers of success. “Uni-tasking” may feel initially

uncomfortable, and your darting thoughts may seem impossible to tame, but, just as with building the strength of your bicep, regular practice will build your single-minded concentration. Try dedicating five minutes before every client meeting to clearing your mental debris and consciously creating space for what will emerge when you and your client put your thinking heads together.

2. **Consistent and Even Energy.** Not only what you eat, but when you eat matters. Do you think you will be able to hear the story beneath the story your client is telling you if you have indigestion or if you are losing focus as your blood sugar drops and your stomach rumbles because it’s been seven hours since you last ate?
3. **Regular Exercise.** Not only does regular exercise improve physical stamina and mental clarity, essential elements of maintaining energy and focus during client meetings, but it also builds confidence—yours and your clients’. You not only begin to feel more comfortable in your own skin, but your comfort communicates to your client a level of self-respect that is contagious and confidence-inspiring.
4. **Don’t Fight Fatigue.** In a “do more” culture, many high-achievers choose to prioritize almost everything over sleep. Figure out what your natural sleep quotient for high performance is and stick to it. Lack of sleep cannot be hidden—your clients see your glassy eyes and stifled yawn, and your tired mind offers little space for innovative and creative thinking.

The Essential Differentiator

By choosing to cultivate your health as a professional asset, you’re not only a role model of possibility to your clients, you tap more deeply into your own potential and

open the space for a deeper and more connected relationship with your clients. By “taking care of yourself first, then getting out of the way,” you are more effective at maintaining a client-centered discovery

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process that is critical to creating and maintaining client trust. And if the ability to kindle trust within clients used to be important to the success of an adviser, the current economic climate has offered the opportunity for it to be an essential differentiator.



Endnote

1. C. Anderson and D. Sharpe, *Research: Communication Issues in Life Planning*. (Denver: FPA Press, 2008) 47.