My Communication Style

Name:_____

Personal finance is a very private topic, one we usually don't share with many people in our life outside of our family and financial advisor. It is also an infrequent topic and we don't get many opportunities to discover how to have comfortable and productive money conversations.

We all have a preferred style of communicating when we are talking about our money. Finance related discussions are more productive and less emotional when we know your communication style. The following exercise is designed to allow you to quickly identify your primary communication preferences when talking about your money.

Please circle the communication preferences you would like us to be aware of and remember.

Only circle the three or four that strongly apply to you.

Encourage my input.

Be an active listener.

Remember my need for control.

Give direct answers; get to the point.

Move quickly to the bottom line.

Offer options so I can decide.

Allow me time to process my response.

Tell me who is involved.

Use logic, summaries and key points.

Soften the tone of communication.

Slow down the pace of communication.

Look for ways to minimize the risks.

Use graphics and verbal communications.

Remember my need to analyze.

Invest time in building the relationship.

Expect me to ask you to provide facts.

Do not mistake my lack of response for inattention.

When meeting with **Harmony Financial Advisors,** or other professionals, take time to review your preferred communication style. You might use a sentence that goes something like this:

"When you communicate with me as my financial adviser please remember my tendency to _____, and my need for _____.

The exercise above was taken, with permission, from **LifePath Financial DNA** body of work found at: http://communicationdna.com This exercise is a very minor piece of their unique procedure for helping individuals and families identify their financial personalities. Used by permission by **Harmony Financial Advisors**, developed by **The Sudden Money Institute.**