

# Communicate with Purpose

## Video Communication Idea

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During times of crisis, sometimes clients want to hear what you are saying, not just read what you are thinking. Consider creating a brief (2-4 minute) video explaining to clients how to more effectively cope with their emotions.

### Suggested Communications:

#### Introduction

As we face unprecedented market, economic, social and health issues, I wanted to share a brief, but very important reminder to our clients.

#### Content

- **Acknowledge:**
  - Volatility returned to the stock market in (insert month) with markets falling about (insert percentage).
  - Sharp jolts like these can be nerve-wracking, even when you know that pullbacks are a normal part of long-term investing.
  - It's also normal to feel anxious during selloffs or uncomfortable as we wait and see if markets fall further.
  - We can't change how we feel during volatile markets, but we can learn how to keep our emotions from affecting our investment decisions.
- **Confirm financial plan or long-term plan:**
  - Part of the work we have done together is to create a financial plan that takes into account your goals and objectives, as well as market volatility. Our investment strategy includes responding to volatility in a disciplined way.
  - The other, very crucial part of your long-term plan is you. If you panic, there isn't much your allocation, financial plan or investment strategy can do for you. So, it's important to identify what helps you stay calm in tumultuous markets.
- **Provide ideas for avoiding emotional mistakes and decisions:**
  - **Turn off news about the markets!** Our job at (insert firm name) is to be on watch and I assure you, we are keeping a very close eye on the markets and how they relate to your financial plan and objectives. We will be in contact with you should we feel it necessary. With that said, we are here and available to talk if you feel you need to talk.
  - Focus on what you know. In uncertain times, we tend to focus on what we don't know, like how long the selloff might last. Instead, think about what you know for sure: that you need to be invested to reach your goals, and stocks have been the best way to grow your portfolio over time. You also know that stocks have sold off in every year back to 1980, and yet they've usually finished the year with gains.
  - Avoid extreme changes to your portfolio. Big moves in and out of the market can have long lasting repercussions, so if you feel like you have to make a change in your investments, contact us so that we can help you make the best decisions, from a rational, non-emotional, strategic perspective.

## Close

- Remind clients that you are available for them, and, that you understand the fear, worry, concern and uncertainty they are feeling, after all, you are in the same boat.
- Provide contact information, note changes such as the option for video/virtual meetings, you may even offer your best clients your cell number with a note that you are available at that number until 8:00 pm.

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