

WHAT YOUR CLIENTS WANT TO HEAR



To help financial professionals set themselves apart when communicating with clients, Transamerica talked to seasoned investors on both coasts. We learned their preferences, and are bringing these powerful findings to you.

When talking to clients: SAY THIS	INSTEAD OF THIS...
Commitment	Passion, mission, or promise
Tools, services, and solutions	Products
What do you want your lifestyle to look like in 10 years?	What does your perfect day look like?
Strategy	Roadmap
Knowledgeable	Innovative
Personalized planning	A “whole person” mindset
Long-term thinking	Vision
Trust	Relatable
Expertise	Unique perspective
Track record of success	Optimistic

Ask your wholesaler for other materials from this series, including **“22 Key Phrases for 2022”** and our **“Language of the Customer”** guide.

Start the conversation.

Find more resources for you and your clients at transamerica.com/resource-center.

 **Visit:** transamerica.com

 **Contact:** 800-797-2643

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