

# Say it So it Makes a Difference



# We've all had this kind of meeting



## The Villain

# THE CURSE OF KNOWLEDGE



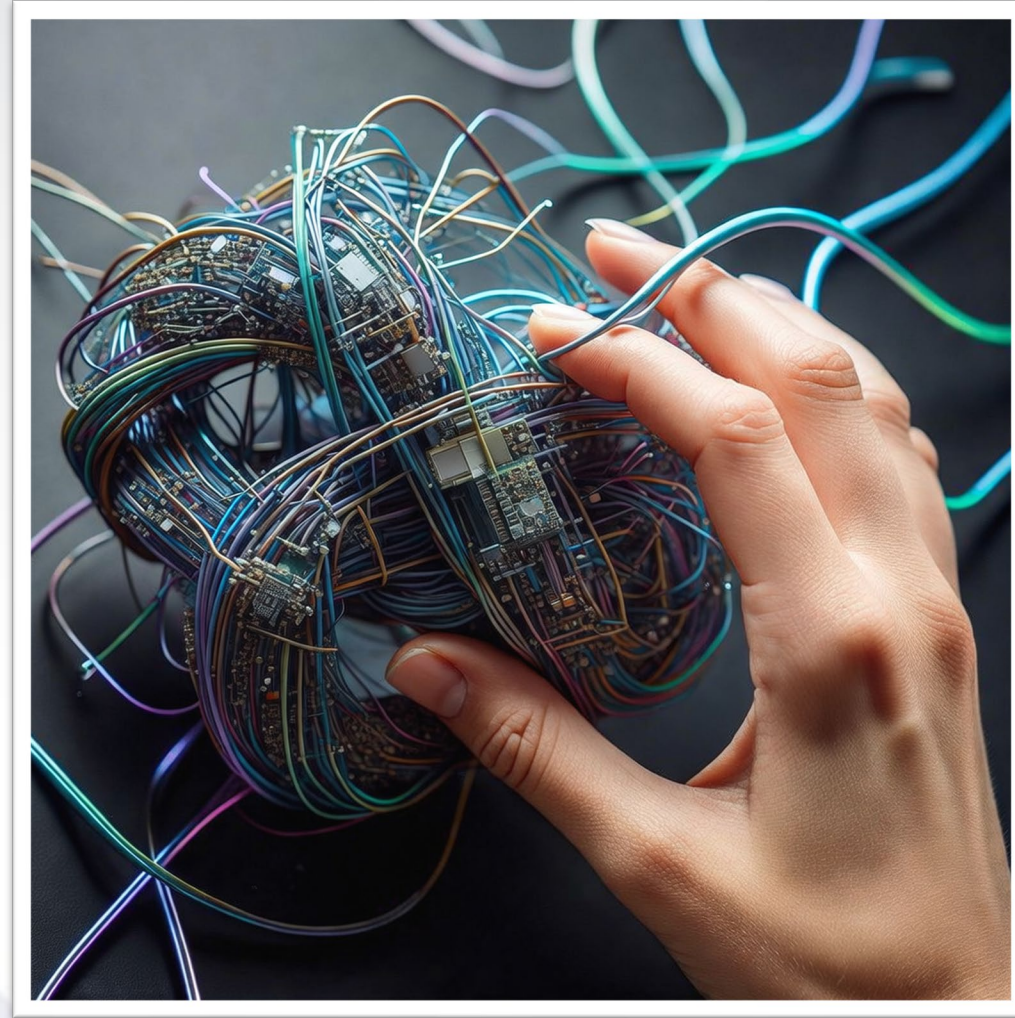
# If you've played Charades, you know the Curse of Knowledge



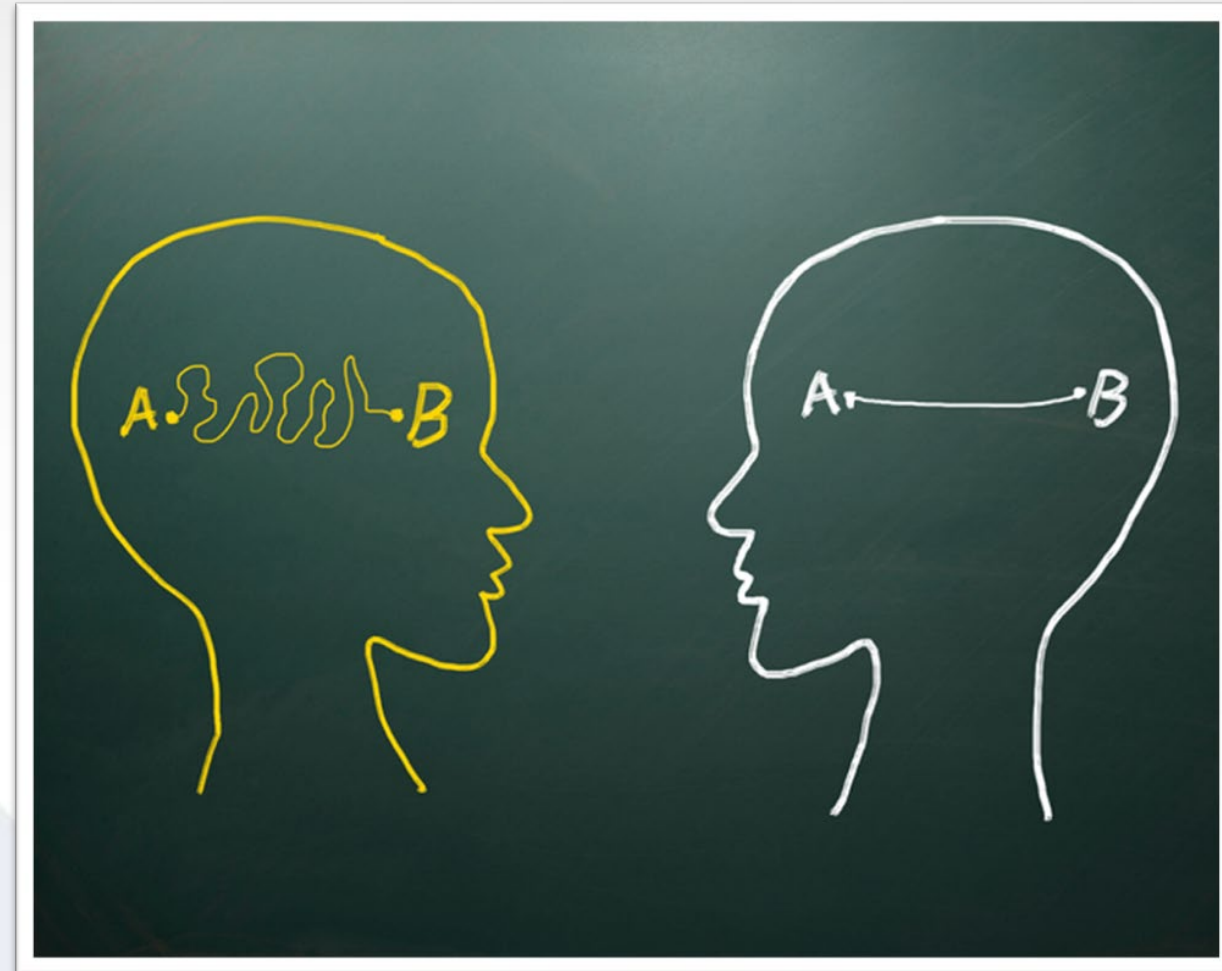
# People do not buy what they don't understand



# The Curse of Knowledge creates complexity



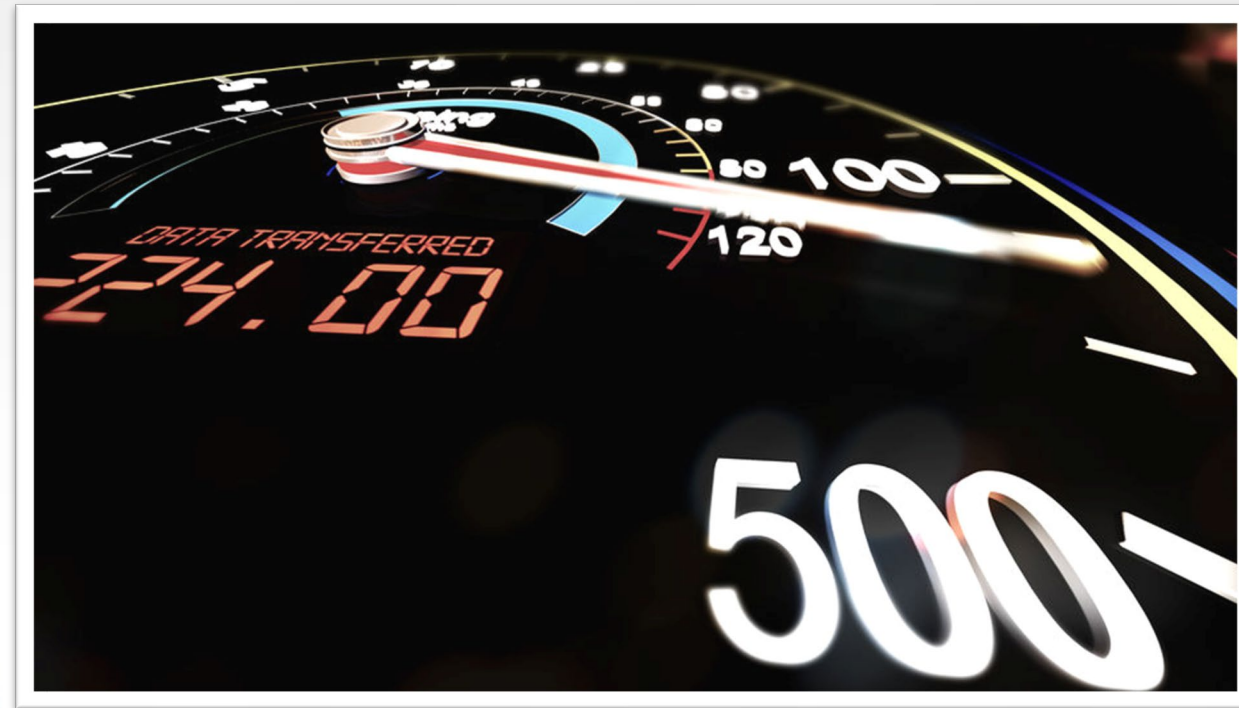
# Complexity makes clients feel confused, not confident



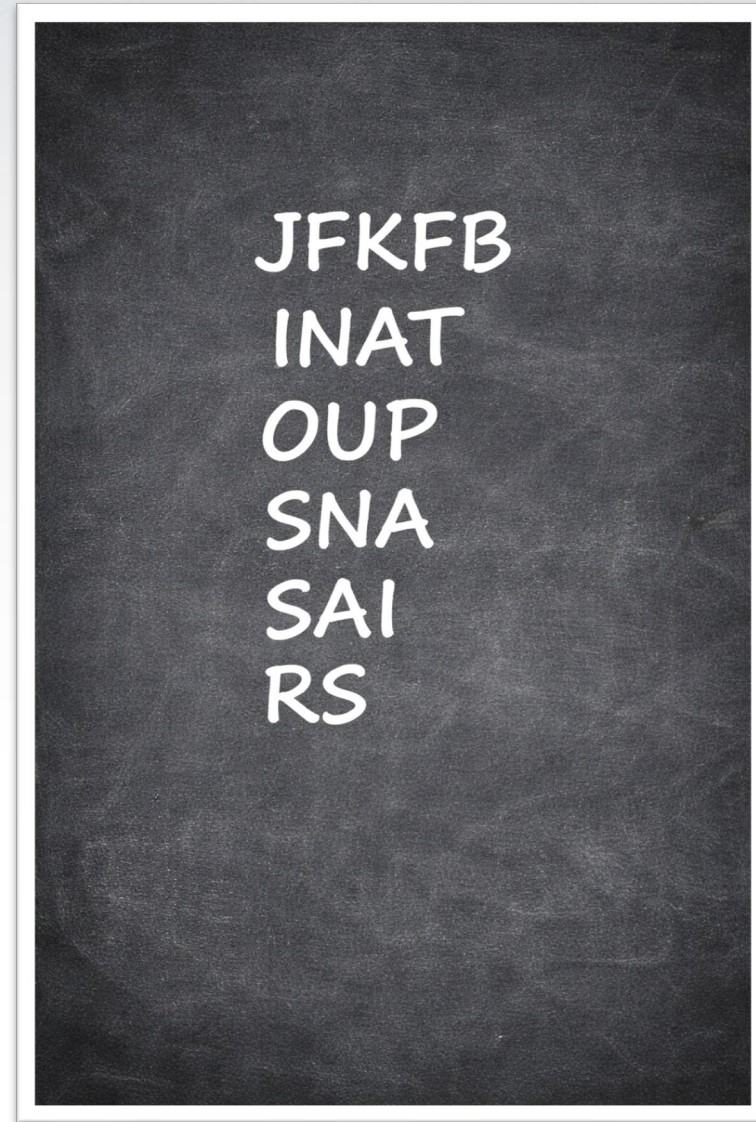
# Referrals stall because of complexity



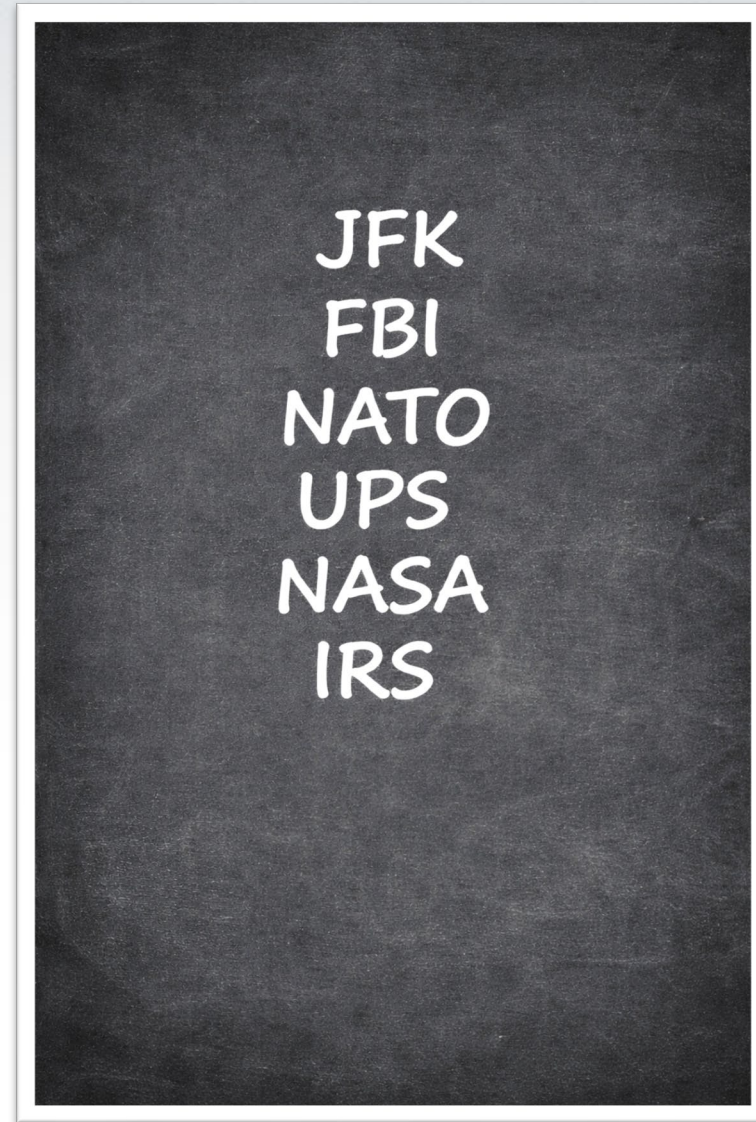
# Getting our information across is a bandwidth issue



**There's a limit to how much information clients can juggle at once**



# We need to tailor our information to be more effective



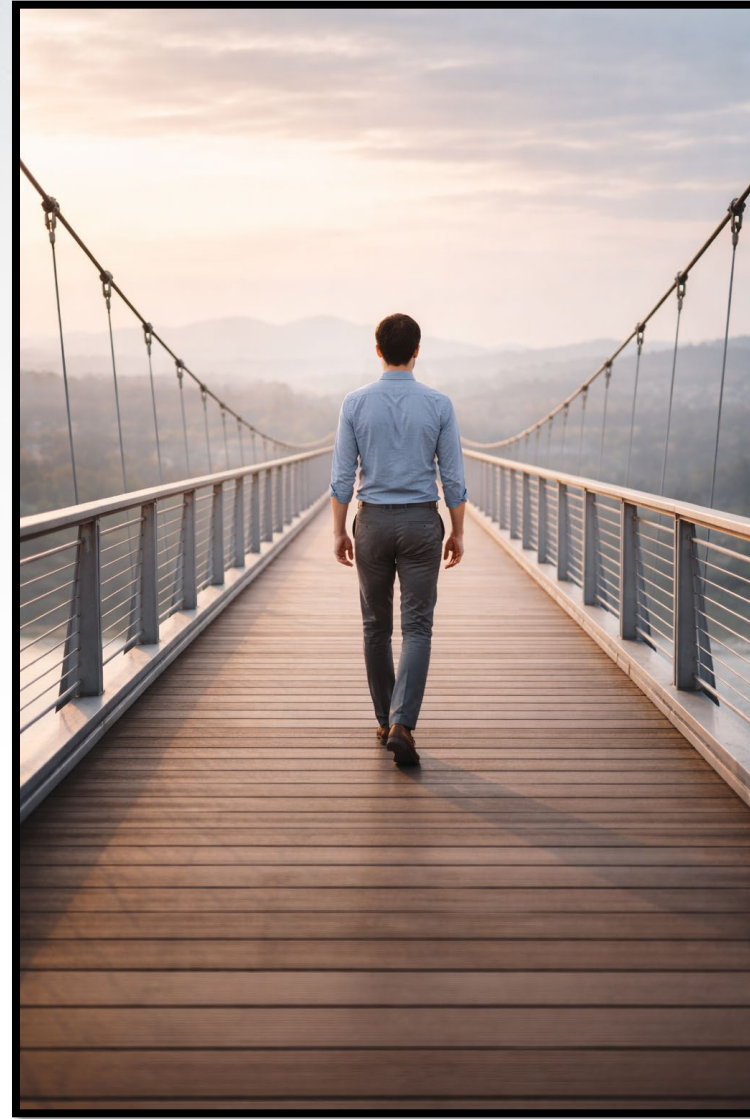
**In this business, clarity is your superpower**



# Clarity is a growth engine

People Buy...  
From People They Trust

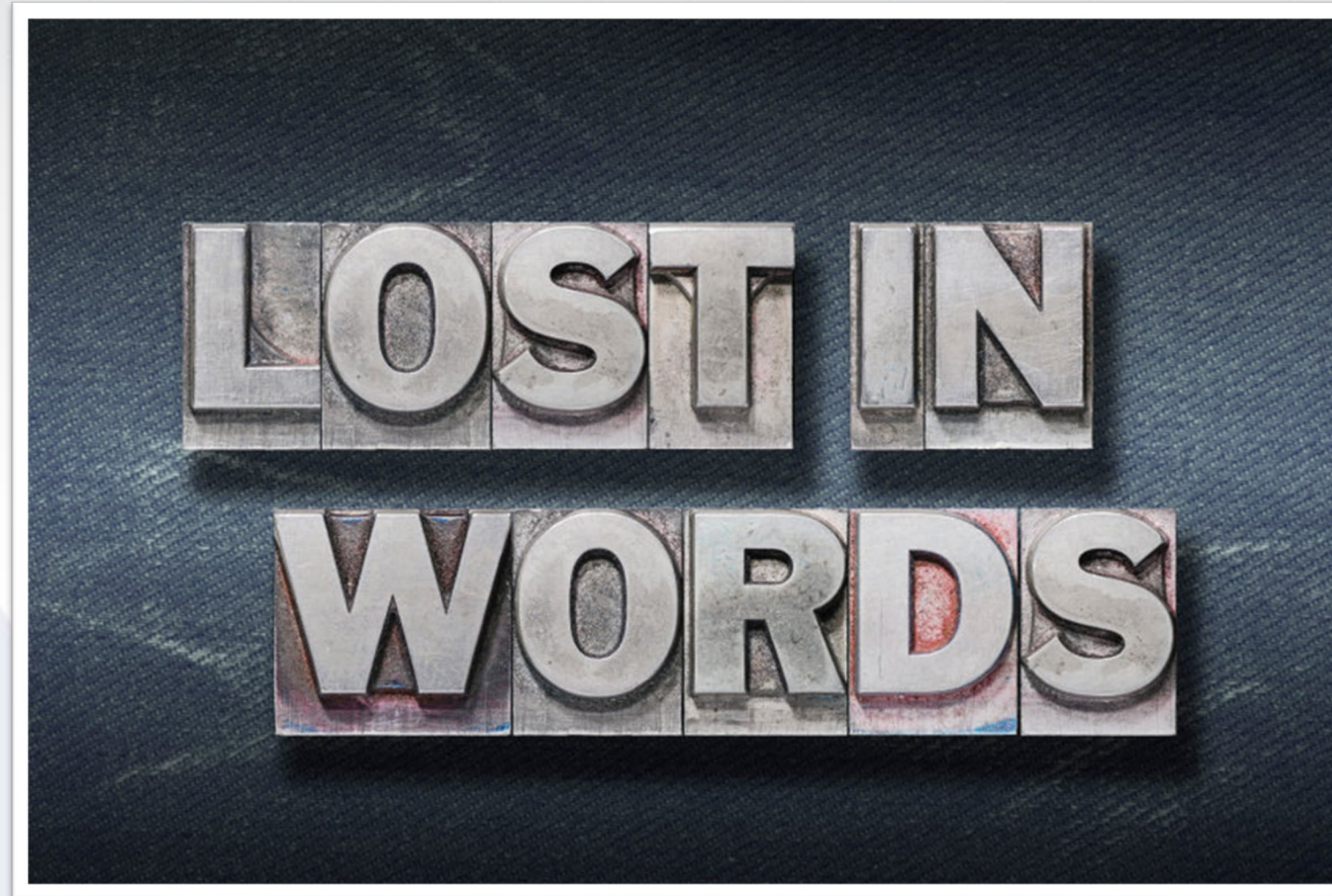
# Clarity keeps clients committed



# Clarity increases referrals



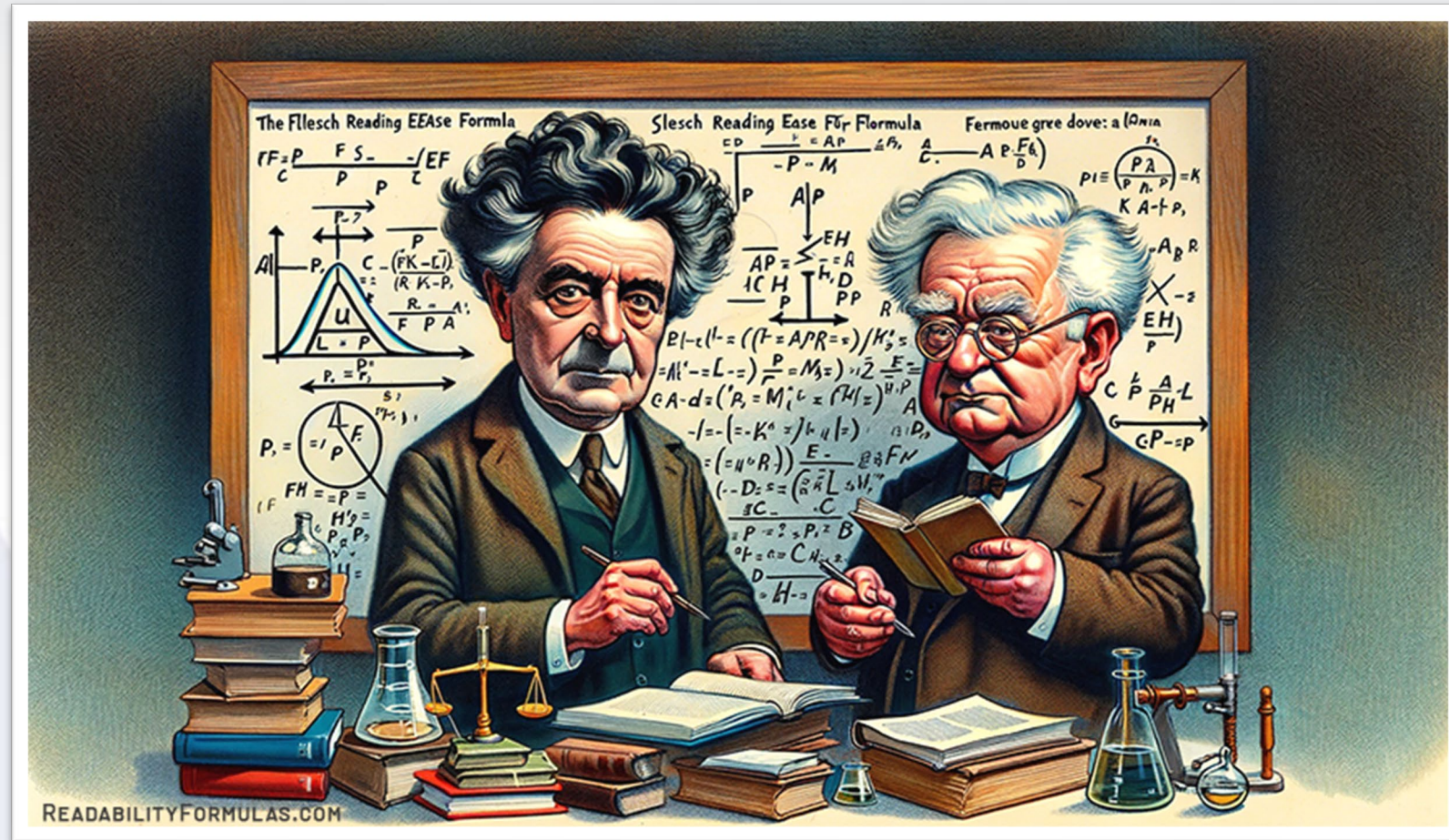
# How to overcome the Curse of Knowledge



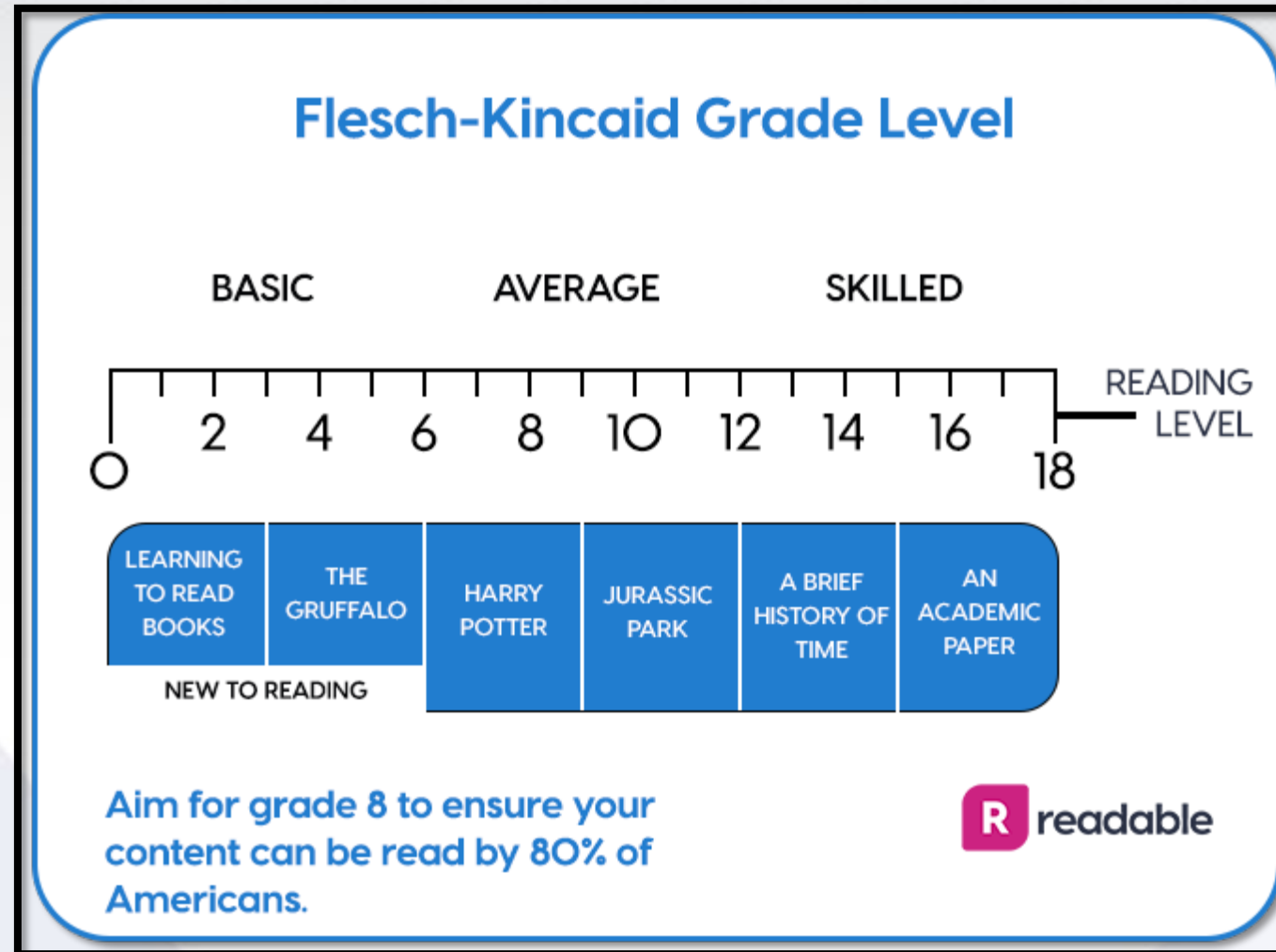
**Do not assume that everyone knows what you know**



# Stop trying to translate difficult to understand content



# Replace complexity with simplicity



# Transform your data into stories and analogies



# Clients understand simple stories



# Financial FFREEDM

**F: Financial Planning**

**F  
R  
E  
E  
D  
M**



# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R**

**E**

**E**

**D**

**M**

# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R: Retirement**

**E**

**E**

**D**

**M**

# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R: Retirement**

**E: Education**

**E**

**D**

**M**

# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R: Retirement**

**E: Education**

**E: Estate Planning**

**D**

**M**

# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R: Retirement**

**E: Education**

**E: Estate Planning**

**D: Disability Income**

**M**

# Financial FFREEDM

**F: Financial Planning**

**F: Family Income**

**R: Retirement**

**E: Education**

**E: Estate Planning**

**D: Disability Income**

**M: Mortgage**

## Clients pay attention to unexpected stories



# Clients remember concrete stories



# People believe credible stories



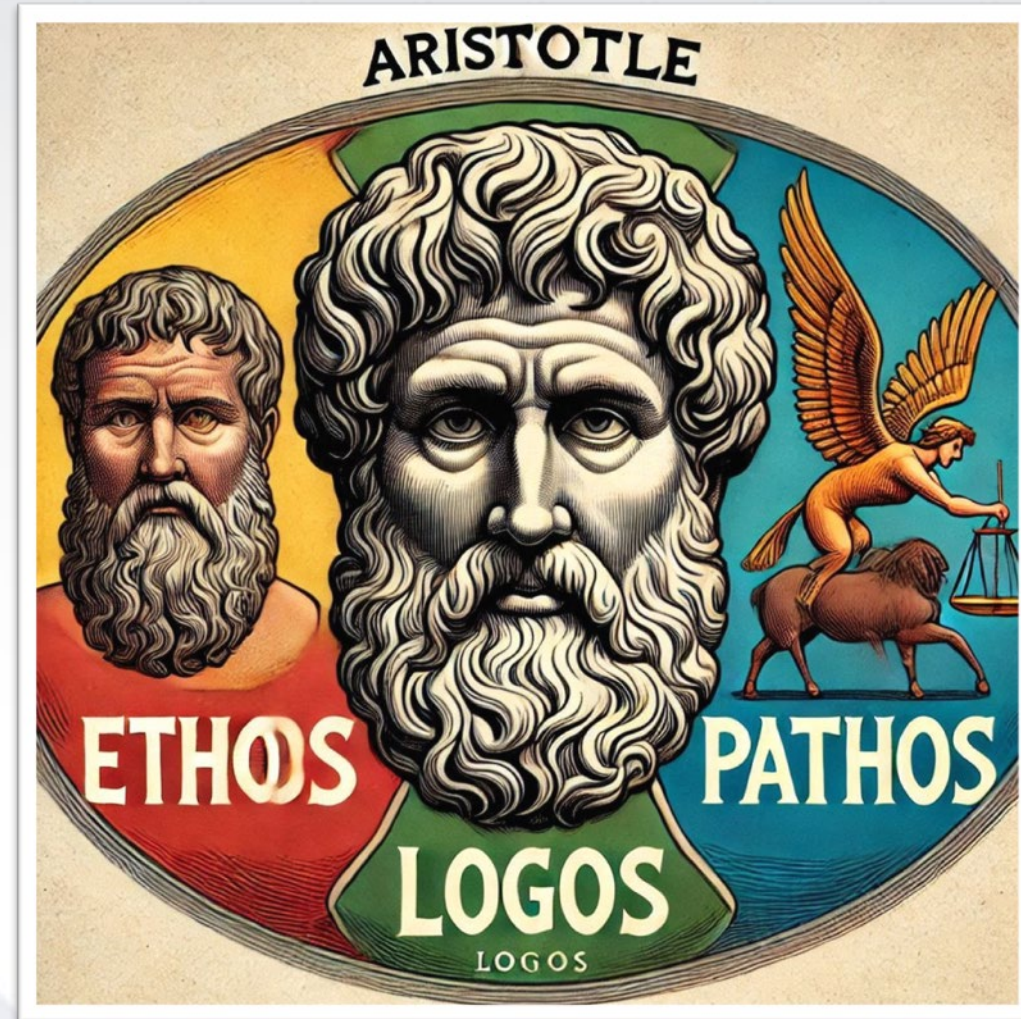
# Emotional stories get people to care



# A simple, unexpected, concrete, credible and emotional story



# Master the art of persuasion



# Ethos: The appeal to authority



# Logos: The appeal to reason



# Pathos: The appeal to emotion



# Analogies that overcome the Curse of Knowledge



**“To be a master of metaphor is the greatest thing by far”**



# Great Advisors say less

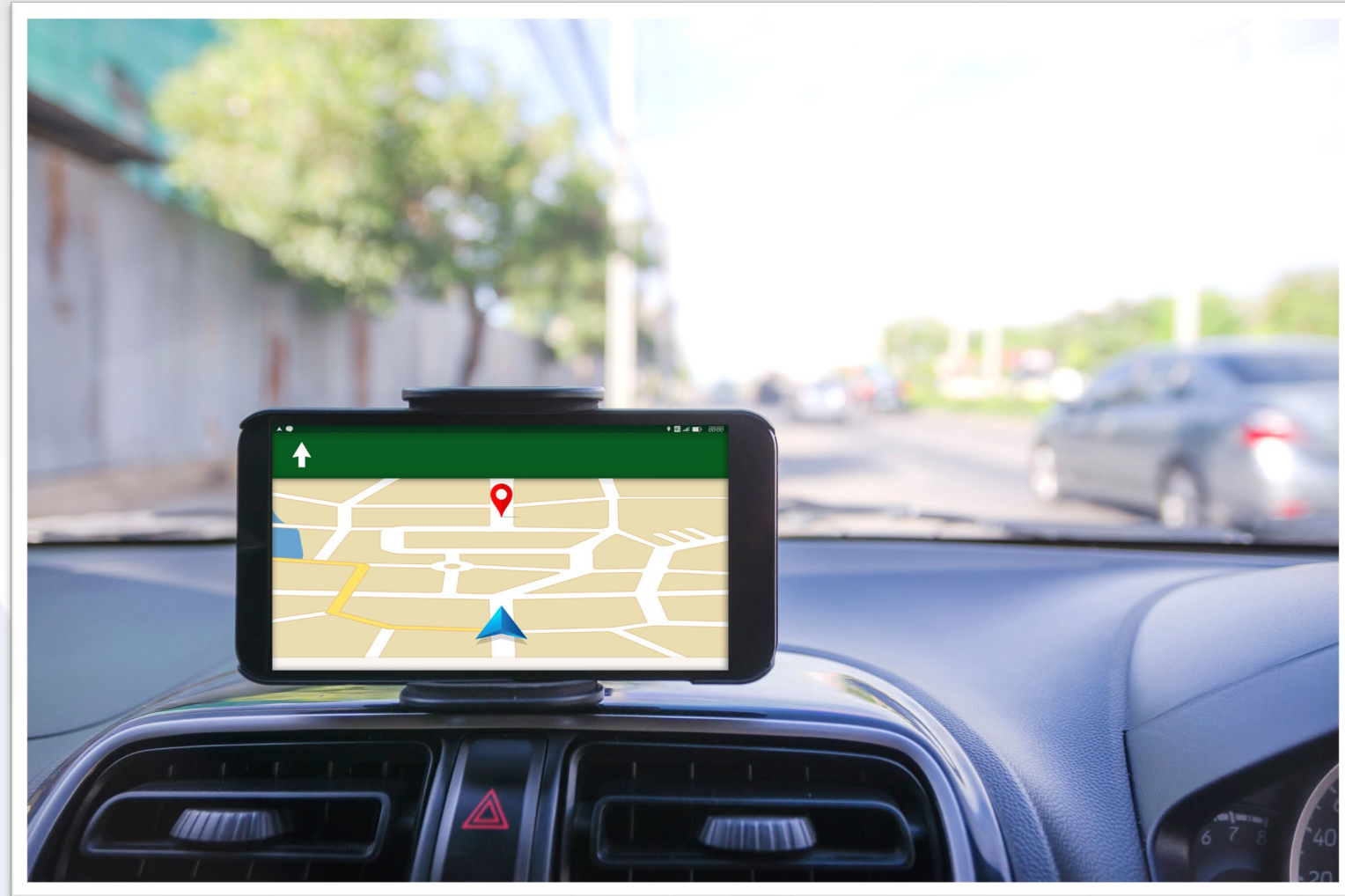


**This market is making me nervous**





# A financial plan is your GPS



# Life insurance is the paycheck that keeps coming



**We want to think about it**



**You're never too young to start**



# What are your fees?



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