



Money Matters with Les Conway

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Trust, Understanding and Mechanics

I believe that good lifestyle financial planning is all about the depth of the relationship built between individuals.

One of the most profound things I learned at the start of my career was that you must listen far more than you talk. Even with people I've worked with for years, I listen considerably more than I speak.

By punctuating the listening approach with thoughtful questioning, a picture is created of what people's objectives, goals, ambitions, fears and hopes are. These change as time elapses and is why it's so important to keep listening.

It's incredible how open people are and how they sometimes get emotional when they feel they have someone really listening to what they are saying. And that approach leads onto the cornerstone of all good relationships - trust.

But it's more than simply trusting a person's ability or experience. You must trust that they have integrity also.

We've all met highly qualified and experienced people, who profess their knowledge. You trust their ability to keep sensitive information confidential. And you trust their judgement and that they've really listened to what you want and need.

Most people don't want to know the ins and outs or the minute detail of financial products. But everyone wants to feel assured that the plan, their plan, will deliver



them to their chosen destination.

It's not dissimilar to the relationship you can have with a good mechanic. They listen to what the problem is, you trust them enough to do the work and the result is you're getting from A to B smoothly again.

If you're like me, you aren't that bothered by what they did under the bonnet. You simply want to feel reassured your car will work and drive reliably.

While many people don't want to get bogged down with what their financial planner does 'under the bonnet', it is imperative that they understand what the individual wants.

And that can only be found out by listening and mutual trust.

Thanks for reading.

Investments can fall as well as rise and you might get back less than you invested

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