

Finding Your Stories

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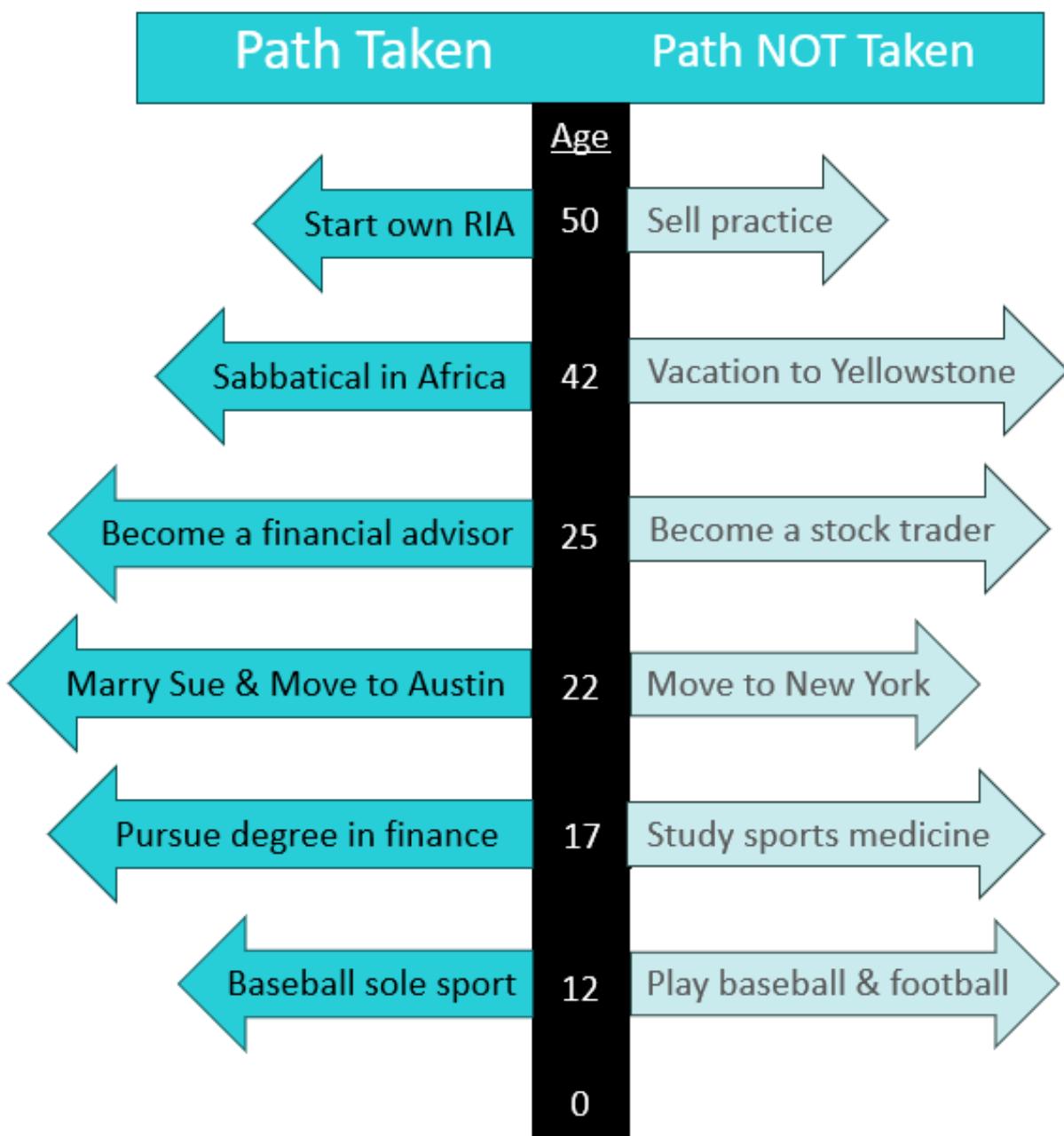
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Why Tell Your Stories

- 1. Build Trust and Credibility:** Personal stories humanize advisors and make them more relatable. Clients are more likely to trust someone who shares their journey and experiences.
- 2. Establish Emotional Connections:** Stories evoke emotions, and emotional connections are powerful in building long-lasting client relationships. Clients often choose advisors they feel a personal connection with.
- 3. Illustrate Expertise and Passion:** Personal anecdotes can showcase an advisor's dedication, expertise, and passion for their work. This can reassure clients about the advisor's commitment to their financial well-being.
- 4. Simplify Complex Concepts:** Personal stories can help explain complex financial concepts in a relatable way, making it easier for clients to understand and engage with financial planning.
- 5. Enhance Communication:** Storytelling is an effective communication tool. Advisors who share stories can engage clients more effectively, making meetings more memorable and impactful.
- 6. Inspire and Motivate:** Personal success stories can inspire clients to take positive actions towards their own financial goals. Seeing how the advisor overcame challenges can motivate clients to believe in their own potential for financial success.

Fork-in-the-Road Path

A great way to identify your stories is to think about the fork-in-the-road decisions that have had a big impact in your life. Review the sample fork-in-the-road path below and then think about your own life to create your fork-in-the-road path.



Fork-in-the-Road Story

Once your fork-in-the-road path has been created, select one of your decisions points. Create a 2-minute story around that decision, using the following format:

1. What lead to the need to make your decision?
2. What choice did you make and why?
3. What impact did this decision have in your life?

Storytelling Best Practices

- 1. Know your why:** Knowing your why is about understanding the underlying purpose or motivation that drives your actions and decisions.
- 2. Story first, then facts:** Starting with a compelling story or narrative before presenting the supporting facts is an effective approach in communication, as it engages the audience emotionally and makes the information more relatable and memorable.
- 3. Know your audience:** Tailor your story to the interests, preferences, and background of your audience. Consider their age, culture, and experiences to make your story relatable and relevant.
- 4. Start with a strong opening:** Capture your audience's attention from the beginning. A compelling opening will pique their curiosity and encourage them to listen attentively to the rest of the story.
- 5. Have a clear structure:** Organize your story with a clear beginning, middle, and end. Introduce the characters and setting, build up the conflict or plot, and conclude with a satisfying resolution.
- 6. Show, don't tell:** Paint a picture with your words to help the audience visualize the scenes, characters, and emotions. Use metaphors, similes, and sensory details to make the story more engaging.
- 7. Build suspense and tension:** Keep your audience interested by creating anticipation and excitement throughout the story. Foreshadowing and unexpected twists can add depth to the narrative.
- 8. Be concise and focused:** Avoid unnecessary details that could distract from the main narrative. Stay focused on the central theme or message you want to convey.

Storytelling Best Practices

9. **Show emotions and vulnerability:** Emotions are a powerful tool in storytelling. Be genuine and vulnerable, allowing your own emotions to shine through, as this will help your audience connect with your story on a deeper level.
10. **Use gestures and body language:** Incorporate appropriate gestures and body language to emphasize key points and create a dynamic and expressive storytelling experience.
11. **Engage with your audience:** Maintain eye contact and read the room. Adapt your storytelling based on the audience's reactions, and encourage interaction when appropriate.
12. **Practice regularly:** The more you practice storytelling, the more natural and confident you'll become. Tell stories to friends, family, or even in front of a mirror to improve your delivery and performance. Adjust the pace of your storytelling to match the tone and mood of the story. Speed up during action-packed moments and slow down during emotional or reflective parts.
13. **Listen to other storytellers:** Attend storytelling events, listen to podcasts, or watch storytelling performances. Observing other storytellers can provide insights and inspiration to enhance your own storytelling skills.
14. **Accept feedback gracefully:** Be open to feedback from others, whether it's praise or constructive criticism. Use it as an opportunity to improve and refine your storytelling abilities.