Behavioral Alpha: A Financial Advisor's Greatest Value

If you asked your clients why they work with you, they might say that they need someone to help them pick the right stocks, or determine the best mix of assets for their long-term financial goals.

But that's easy to do in our age of automation, AI, and robo advisors.

What clients actually need is someone to hold their hand (metaphorically! We're still in a pandemic). Based on a Vanguard survey, the emotional value that an advisor creates through behavioral coaching accounts for about 45% of the total perceived value of an advisor-client relationship.*

Your clients might not always realize it, but the reason they tend to outperform DIY investors comes down to behavioral alpha.

During this powerful on-demand webinar, Dr. Daniel Crosby, Orion's Chief Behavioral Officer, examines the incredible value you can bring to your clients through behavioral coaching and applied behavioral finance techniques.

And if you're not sure how to go about implementing behavioral coaching at your practice, Dr. Crosby has you covered with a step-by-step mental framework for handling client concerns in a way that calms your clients, helps them stay rationale, and keeps them invested.

Get started right now by tuning in to *Behavioral Alpha: An Advisor's Greatest Value*.

Watch Now

Interested in other on-demand webinars from Orion? Check them all out here!

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*"Assessing the value of advice – Vanguard." https://personal.vanguard.com/pdf/assessing-value-advice.pdf