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| |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  |  |  |  | | --- | --- | --- | --- | | |  | | --- | | **BLOG**  [**Mastering Difficult Conversations: Tips for Delivering Bad News to Clients**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9452&elqTrackId=C1895DF1600D969FA6106D60A6B62699&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF507938178A6F60FBF7DE96D1B02259895DD137648E36E87253E0387C63C5AC9B4)  [Delivering bad news is inevitable in financial planning. With the following tips, you can navigate these difficult conversations with confidence while maintaining your clients’ trust](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9353&elqTrackId=1DF7EB482496B1345E0AA67A6949C657&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF503835E2F0F1D572093EA37CC0BFB9ACFDD137648E36E87253E0387C63C5AC9B4). | | **LINKEDIN VIDEO**  [**5 Key Collaborative Activities to Enhance Client Relationships**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9485&elqTrackId=53916C06A15F411EF9B4FE1AB4D6C8F6&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF5E3CED8EECD4E5D9A298F5F198CE30ED7DD137648E36E87253E0387C63C5AC9B4)  In this video, Emily Koochel, PhD, AFC®, CFT™, shares five key collaborative activities to help you create a more transparent, dynamic, and engaging planning experience. | | **BLOG**  [**Crafting A Client Retention Strategy: Best Practices for Financial Planners**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9413&elqTrackId=7A058918568DCBCACF133B4EDC5FA142&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF5E6F3F194629531249F0724E47705E1A7DD137648E36E87253E0387C63C5AC9B4)  The tips and tactics in this blog will help you craft a comprehensive client retention strategy that focuses on three key areas: client experience, communication, and client appreciation. | | | |

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