

# What Fills Your Cup?



Everyone has a unique *why*—their path, their purpose. It dictates how they choose to fill up the cup that is their life. What’s your *why* and how does it connect with that of your clients?

A 2021 eMoney study<sup>1</sup> of nearly 800 financial advisors and clients revealed the value advisors provide aligns with the value clients seek.

### Top Reasons an Advisor Chooses This Profession



### Top Reasons Clients Choose to Work with an Advisor



## Embrace Financial Wellness to Deepen Relationships

To fulfill that value, advisors need to expand their thinking beyond clients’ financial lives, as financial health is just one of the influences on overall well-being and peace of mind.



Financial health

+



Mental health

+



Physical health

+



Relational health

=



Well-being

## Redefining Financial Wellness

90%

of clients say they are receptive to financial wellness discussions with their advisor. To engage clients more meaningfully, reframe the dialogue around financial wellness.

### How Advisors Define Financial Wellness



### How Clients Define Financial Wellness



## Technology Creates Authentic Connections

86%

of clients said they would select an advisor who customized their approach to understand and meet their needs and goals.

### How Technology Can Benefit the Advisor



### How Technology Can Benefit the Client



Utilize technology to create more time for one-on-one conversations and to help clients visualize their financial plans—it’s a win-win to plan with purpose.