



May 7th, 2023

Hello First name / friend,

The 2 most underrated skills that helped me climb the ranks as a young professional at Merrill Lynch (before starting [PACIFIC CAPITAL](#)):

ASKING GREAT QUESTIONS + ACTIVELY LISTENING

1. Asked great questions of potential clients and clients, then actively listened to what they want in a financial advisor.
2. Asked great questions of mentors and industry leaders, then actively listened to what made them successful.
3. Asked great questions of the internal admin staff, then actively listened to what made their job easier so they'd support my efforts to support clients I was bringing onboard.
4. Asked great questions of job candidates I interviewed, then actively listened to see if they'd be a good fit to add to my team.

These 2 skills seem to be a lost art in this hurried and distracted day and age.

Most people aren't genuinely interested in anything or anyone besides themselves. But I promise you:

Learn them both and get good at them, and you can achieve all that you ever dreamed of.

Ps. It works with marriage and parenting too. For some reason, I'm way better at this in business settings, but making efforts to improve at home too! Gonna focus on it even more this week!

Thanks for listening 😊

[CLICK HERE](#) to schedule a time to talk with [OUR TEAM](#).

Ps. We just released 3 new episodes of [“The Smart Money Parenting Show!”](#) Hope you take a minute and check them out!

Sincerely,



[SCHEDULE A CALL](#)

[REFER SOMEONE](#)

