HOW TO BECOME A TRUSTED ADVISOR

FROM THE PERSPECTIVES OF IN-HOUSE COUNSEL

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OUTLINE

- **Earning and Deserving the Trust of Your Clients**
- **The Art of Listening: Identifying Your Clients' Interests**
- **The Rules of Romance: Building Long-Term Relationships**

EARNING AND DESERVING THE TRUST OF YOUR CLIENTS

- **Trust is grown. It does not appear.**
- **Trust is both rational *and* emotional.**
- **Trust is a two-way relationship.**
- **Trust intrinsically entails perceived risk, not actual risk.**
- **Trust is different for the client and the advisor.**
- **Trust is personal.**

THE ART OF LISTENING: IDENTIFYING CLIENTS' INTERESTS

- **Listening is essential to earning the right to be a trusted advisor.**
- **Avoid overly rational listening and overly passive listening.**
- **Avoid "leading the witness."**
- **Use sequential listening to allow clients to tell their story.**

THE RULES OF ROMANCE: BUILDING LONG-TERM RELATIONSHIPS

- **Relationships are the foundation for trust.**
- **Illustrate rather than telling.**
- **The right to offer advice must be earned.**
- **Listen for what is different rather than what is familiar.**
- **Collaborate with your clients.**
- **Don’t be afraid to ask your client for help.**