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Media Release

Mindful Listening – the Need for Advisers to Connect with Clients in the Present Moment

Tuesday August 5, 2014. At a recent financial service industry event on the need for financial advisers to engage with their clients in the present moment, President and Founder of US Based i-Impact Group Mr. Claudio O. Pannunzio reminded the attendees of a famous saying by Henry David Thoreau “The greatest compliment that was ever paid to me was when someone asked what I thought, and attended to my answer”.

“The frequency with which we do things in an inattentive manner in our daily life is simply astonishing. From driving a car to interacting with a client or a prospect, way too often we are on auto-pilot, going through the motions but not being present”, said Claudio Pannunzio.

“The consequences of this inattentiveness are way too dangerous to be quickly dismissed”.

In his workshops, seminars and conference presentations for financial advisers, Pannunzio defines attentiveness as staying in the present or *mindfulness*. It is *paying full attention* to what is at hand – the note being written, the coffee being sipped, the person being spoken to, whatever is around as he / she move through their day. A client meeting, talking on the phone to a friend, shopping at the supermarket are perfect opportunities for advisers to test their ability to be mindful.

Mindfulness is something that everyone possesses and need to ensure for survival. However, its nature is highly elusive. As an adviser sits down with a prospect, completely determined to convert them into a new client, despite their best efforts, the ability to mindfully listen can disappear in an instant. It takes a fraction of a second for the mind to lose its focus and swiftly engage in worries, speculations, projections and fantasies about the future.

Pannunzio affirms that for advisers to practice mindfulness they do not have to drastically change their life. “They will continue to perform their daily activities and chores – however, they will carry them out with a different level of *awareness*. That heightened degree of awareness will trigger some changes in behavior. They will *not* change who they are, but will become more fully present with every situation. As a consequence, they will be able to better observe thoughts, feelings, and preferences”.

“Mindfulness makes us more sensitive to the present moment. It generates an energy that empowers us to actively notice new things, take advantage of opportunities as they manifest, and be able to produce more positive outcomes”, added Pannunzio.

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For Pannunzio, life can best be described as a sequence of moments. Consequently, the more we focus our attention to make each moment matter, the more our life will matter. “During a meeting, the adviser should not let their mind race forward worrying or engaging in speculation about the meaning of the short pause the client made while answering a question. Rather, just notice it, acknowledge it in the mind and come back to the present, to the conversation, to the client”.

Listening mindfully is one of the hardest things for a human being to master. Many advisers experience unconscious barriers to good listening that prevent them from clearly recognizing when they are *not* listening.

Mindful listening is a magnetic and creative force. When advisers listen to what the client says, they experience a satisfying expansion and become highly creative. It is this creative force that actually enables ideas to spring forward and come to life.

“We experience it countless times but, regrettably, we easily forget. One of the most valuable rewards of listening in a mindful manner is the opportunity we get to learn something we might not know”, continued Pannunzio.

“Advisers conscientiously listening to their clients enables them to gather good intelligence about what they worry and care about, what motivates them and, ultimately, why they work with – and what they really ‘want’ from the adviser”.

By listening mindfully, advisers will be better able to facilitate their client's pursuit for financial freedom, better address their demands, and even dispel some of their financial fears.

During a client meeting, Pannunzio encourages advisers to pose a question, such as “*What are the most important challenges our firm has helped you successfully address?*” Then, commit to mindfully listen to every word articulated by the client. The answer may yield valuable information, some of which may have been mentioned during past conversations, but because the adviser many have been on auto-pilot... missed.

“The ultimate goal of mindful listening for advisers is simply to listen – nothing more and nothing less. Focusing attention and activity on what they are doing in the immediate moment, whole-heartedly without getting side-tracked by premature ideas and projections of future personal gain, which incidentally are *not* pertinent to the present moment and may or may not happen in the future. When advisers are completely ‘present’ in that way, each activity becomes the most important activity they can perform for their highest and greatest good and that of their clients”, concluded Pannunzio.

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