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***Working with the Emotional Investor:
Financial Psychology for Wealth Managers***
by Chris White
with Richard Koonce

Emotions, *not* logic and reason, are what typically drive investors in making critical investment planning decisions. That's according to seasoned wealth advisor Chris White, CFA, author of the new book, ***Working with the Emotional Advisor: Financial Psychology for Wealth Managers*** (Praeger, 2016).

While popular wisdom suggests that investors make investment choices based on rational thinking, White, a long-time wealth counselor to affluent and wealthy individuals, couples, and families, says it's far more likely that people will make decisions about their investments based on unique emotional responses shaped by their early life experiences. Those experiences can include: the "imperfect love" a child received from their parents; childhood events that featured danger, threat or loss; the influence of key authority figures in a young child's life; family values and culture, and more. These factors all shape the development and growth of an individual's 'emotional template.'

"As adults, these embedded emotional elements in a person's make-up greatly influence that individual's risk tolerance, their feelings about gain and loss, and their ability or inability to act in their own financial interest," says White, "especially in high-stakes circumstances such as economic uncertainty, life transitions, or a roiling stock market."

Because investing is such an emotion-driven exercise, White contends in ***Working with the Emotional Advisor*** that it's essential for wealth advisors to take the time to fully understand and appreciate the emotional make-up of their clients. "By doing so," he continues, "an advisor can build strong, unshakeable trust with clients and work with them to craft investment plans aligned with their financial goals, values, and personalities."

Blending fresh insights from social psychology and neuroscience with sophisticated client engagement techniques honed over the course of a 25-year career in financial advising, White wrote *Working with the Emotional Investor* with the express purpose of helping his fellow wealth advisors and financial consultants take their own relationships with clients to new levels. How? By helping them understand the emotional factors that influence client decision-making about investments, especially in high-stress, high-stakes circumstances.

“For as long as I can remember, I’ve been fascinated with the study of human nature and what motivates people with regard to investing and the financial markets,” adds White. “Applying psychological insights to managing client relationships has been key to me building strong, trust-based relationships with individuals, couples, and families.”

A must-read for wealth advisors, financial consultants, certified financial analysts, and retirement advisors, as well as individual investors of any financial means who want to better understand their own emotions as a component of their attitudes about money and investing, *Working with the Emotional Investor* features well-tested and rigorously developed psychological models of human behavior together with powerful client management and engagement tools designed to build strong and lasting client-advisor relationships. In reading *Working with the Emotional Investor*, readers will develop a better understanding of:

- How to recognize the emotional and psychological factors behind investor behavior, and apply these insights to be better wealth advisors
- Why early childhood experiences of love, joy, and loss, and sometimes very subtle family dynamics, play a key role in adult investor behavior
- Why being sensitive to an individual’s unique psychological “system” is key to being able to accurately assess their tolerance and acceptance of risk-taking
- Causes of sudden client personality changes that occur in high-stress or high-stakes situations
- The three types of client personalities (“Fixer,” “Survivor,” and “Protector”) that show you under high-stakes circumstances
- How to employ sophisticated client relationship management practices such as curiosity, appreciative inquiry, and powerful questioning to understand clients’ needs
- And much more!

About Chris White, CFA

Chris White, CFA, is an experienced wealth management advisor and strategist who has invested on behalf of hundreds of individuals, families, couples and institutions for over 25

years. Through this work, he has developed a keen sense of human nature, and come to understand how human emotions, life experience, and family history (more than rationality) typically drive decisions people make about their money. He is a chartered financial analyst and a member of the CFA Institute, the Boston Security Analysts Society, and the Boston Economics Club. An avid sailor, White lives with his wife in Boston.

For more information, visit www.theemotionalinvestor.net.

Working with the Emotional Investor is available for purchase on Amazon, BarnesandNoble.com and through other fine booksellers.

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