



How to maintain client connection in a time of social distancing

In the wake of a global pandemic and volatile markets, many financial advisors are left to triage investor calls from remote, makeshift workspaces. While social distancing may help remedy the spread of germs, it doesn't always bode well for client relationships.

Consider these communication strategies to help your clients feel connected and reassured — even when you can't meet with them in person.

1 “No news” isn't “good news.” Keep your clients informed.

Headlines and social media are coming at your clients from all angles, so it's hard to know what to believe — and confusion only breeds anxiety.

What you can do: Consider sending a “state of the union” email to all of your clients explaining what's going on, why this is happening and what you're doing about it. You can also set expectations and let your clients know exactly where you are and when they can expect to hear from you.

2 Everyone has communication preferences. Find out theirs.

Communication is key — but everyone has different ways of doing it. Respecting your clients' preferred communication methods will help put their minds at ease during this especially volatile time.

What you can do: Consider asking clients how they'd like to connect (phone, email, printed and mailed materials, video conferencing) as well as how often they'd like to be communicated with. While face-to-face isn't an option during social distancing, technology can keep us better connected than ever.

3 Educate them.

Knowledge is power. So, helping your clients understand what they can do (and avoid doing) in volatile markets is a value only you, their financial advisor, can add.

What you can do: Consider sharing these investor-friendly materials with your clients that may prove empowering during this time of financial uncertainty.

[Why it's never a good idea to try and predict the markets](#)

[Loss-aversion bias: how the fear of losing can hurt your investments](#)

[When you try to predict what's next in the markets](#)

Social distancing does pose its challenges, but it also offers up new opportunities to connect with clients. As a global company, we've been connecting with people across geographies, time zones and markets for nearly 100 years.

We're committed to continuing to deliver timely, relevant thought leadership on our [blog](#) to help you stay connected to market news — and your clients.

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