

**BEHAVIORAL  
INVESTING  
INSTITUTE**



# **BII BEHAVIORAL FINANCE COACHING AGENDA**

To schedule a consultation to learn more about the program and pricing, either visit our site: [biicoaching.com](https://biicoaching.com), or contact *Greg Brunck* at (888) 457-7555 or [contactus@biicoaching.com](mailto:contactus@biicoaching.com)



## TRAINING CALL ONE - INTRODUCTION TO PROGRAM

- Practice Constitution
- Psychometric Profiling
- Homework: Practice Constitution & Personal Psychometric Profiling questionnaire
- Trainers: *Eben Burr and Dan Kullman*

## TRAINING CALL TWO - PORTFOLIO DESIGN

- Behavioral Portfolio Design Training
- Portfolio Compartmentalization
- Identify Vulnerabilities
- Homework: Review Risk Analytics
- Trainers: *Dan Kullman and Greg Brunck*

## TRAINING CALL THREE - PORTFOLIO DESIGN IMPLEMENTATION

- Analysis Review
- Solidify Portfolio Design
- Know Your Team Practice Drill
- Manager Review Form
- Trainers: *Dan Kullman and Greg Brunck*

## TRAINING CALL FOUR - BEHAVIORAL GUIDANCE TOOLS I

- Presenting Behavioral Portfolio Design
- Managing Risk Perception Toolkit
- Who What Why When
- Review your Syntonic Psychometric Report
- Trainer: *Eben Burr*

## TRAINING CALL FIVE - BEHAVIORAL GUIDANCE TOOLS II

- Investment Owner's Manual
- Investor Cheat Sheet
- Pre-commitment Flashcards
- Introduce "Your Financial Narrative"
- Homework: Do "Your Financial Narrative"
- Trainer: *Eben Burr*

### TRAINING CALL SIX - BEHAVIORAL GUIDANCE TOOLS III

- Review “Your Financial Narrative”
- Using the Goal Keeper
- Portfolio Checkup
- Introduce Trade Sheet
- The Decision Matrix
- Homework: Make a personal decision using “The Decision Matrix”
- Trainer: *Eben Burr*

### TRAINING CALL SEVEN - SYNTONIQ PSYCHOMETRIC PROFILING

- Setup and Training
- Homework: Send questionnaire to a client
- Trainer: *Greg Brunck*

### TRAINING CALL EIGHT- CLIENT ENGAGEMENT CYCLE CONSTRUCTION


- Client Engagement Cycle
- Implementation Process for Clientele
- Introduce Red Team
- Progression Tracking Training
- Homework: Establish Your Red Team
- Trainers: *Eben Burr and Dan Kullman*

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### FOLLOWED BY TEN MONTHLY COACHING CALLS

- Assess use of behavioral guidance tools
- Chart the goals for the following month.
- Revisit and build on concepts from training calls
- Discuss techniques for emergent client issues (previous and expected)
- Trainers: *Eben Burr and Dan Kullman*

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**MONTHLY COACHING CALLS' CURRICULUM WILL BE CUSTOMIZED BASED OFF ADVISOR'S NEEDS AS INDICATED IN THE PROGRESSION TRACKING. SOME OF THE TOPICS INCLUDE:**

**1. COMMUNICATING BEHAVIORAL PORTFOLIO DESIGN**

- Detach from “resulting,” where the idea of the result is the only thing that matters.
- A sound process is key, it will never be 100%, but it may be more desirable than shifting strategy, based on short term impulses.
- Define it, communicate it, stick to it.

**2. INTERIOR VS EXTERIOR FINANCE**

- Behavioral finance looks at the macro aspects of financial behavior attempting to correct for human characteristics.
- Interior finance looks at the micro level of an investor’s thoughts, feelings, and beliefs about money.
- Asking for them to tell you about their history will get you part of the way there, having them show you what is in their subconscious will paint a more complete picture.

**3. LONG TERM INVESTING = MAKING LOTS OF SHORT-TERM DECISIONS**

- Metacognition, what are you thinking about your thoughts?
- We would like to instill a process working through the challenges of being an investor in advance of that challenge presenting in the client’s portfolio.
- How do we accept these challenges and build decision frameworks to get through them while attempting to minimize the discomfort?

**4. TALKING ABOUT PERFORMANCE WITHOUT TALKING NUMBERS**

- Using performance information without encouraging benchmark centricity or performance chasing.
- Create a narrative to help client internalize the roles of each player and how they will be in and out of favor at different times, but how each piece works together with the others.

**5. RISK TOLERANCE, RISK CAPACITY & RESIDUAL RISK**

- Risk tolerance tools are not considered to be thorough and the true understanding of one’s risk tolerance and capacity comes from understanding the individual and their history, where they are, and where they would like to be.
- With the Goal Keeper App one can make decisions about what compromises may need to be made to realize one’s objectives.

## 6. WHO HAVE YOU FOUND TO CHALLENGE YOUR IDEAS?

- What are the vulnerabilities of your practice?
- If your practice were for sale what would contribute to the price and what would detract from it
- We tend to surround ourselves with people that think the way we do and believe what we believe, but this does not push us to grow.
- How can we challenge our own decision-making process?
- We will look at your practice, plans, and portfolios to see where we may be able to add value.

## 7. ACKNOWLEDGING UNCERTAINTY WHILE SEEKING TO INSTILL FORTITUDE

- The gap between stimulus and response
- Segment clients for different communication scenarios. People will respond to different kinds of markets differently. Segment your clients not by assets, but by expected or experienced behavior.

## 8. DEVELOPING AND CONVEYING THE MARKET AGNOSTIC MINDSET AND SYSTEM

- Admit and insist that it is impossible to know the market future
- What are the consequences of being right or wrong about future events.
- If one does not stick to the system, then right or wrong, you now have no process to follow.

## 9. THAT WHICH WE CAN CONTROL, INFLUENCE, OR NEITHER INFLUENCE NOR CONTROL

- Keeping clients engaged in your process as a planner by reiterating the things that are important and that following an adaptive plan based on life changes, not on fear is essential.

## 10. PREPARATION VERSUS REACTION

- Acceptable vs ideal
- Review performance systematically rather than based on short term moves. Share with clients your criteria for this assessment so they feel more emotionally as well as financially invested in their plan.

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