



How to maintain client connection in a time of social distancing

The global pandemic has changed a lot of things for a lot of people. As financial advisors adjust to remote work spaces and virtual meetings, most are still figuring out the best ways to stay connected with clients.

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 monthly or quarterly update to your clients with a recap of the market state and any headlines/topics that may be pertinent.

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 today's market 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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