



What are YOUR Communication Preferences?

We all have a preferred style of communicating when we are talking about our money and key commitments. Finance related discussions are more productive and less emotional when we know one another's communication styles. This exercise is designed to help you pinpoint how you can feel more comfortable and productive in meetings and how you like to receive information and recommendations. Please check those preferences that are important to you, and share copies with everyone in your Brain Trust.

I would like members of my professional team to:

- Encourage my input
- Be active listeners
- Remember my need to be in control
- Give direct answers; get to the point
- Offer options and let me decide
- Let me take time to process my responses
- Use logic, summaries, and key points
- Soften the tone of communication
- Slow down the pace of communication
- Look for ways to minimize risks
- Use graphics and other visuals
- Remember my need to analyze
- Invest time in building a relationship
- Offer recommendations
- Provide printed copies of options we discuss
- Provide emailed copies of options we discuss
- Do not mistake my lack of response for inattention
- Provide me with timelines and deadlines for decisions to be made

Recognize the following sign(s)

"I need to take a break": _____

"I don't understand": _____

When you work with me, please remember my tendency to _____
_____ and my need for _____.

Will I want someone else involved in my decisions? If so, who?
