# **EMOTIONAL INTELLIGENCE**

#### WITH FINANCIAL SERVICES

### CONFIDENCE IN PROFESSIONAL ADVICE

The majority of U.S. consumers trust financial advisors when it comes to receiving financial advice.



of Americans agree that qualified financial advisors are trustworthy



# reliable source of financial advice than friends or family.

A majority of Americans consider financial advisors a more



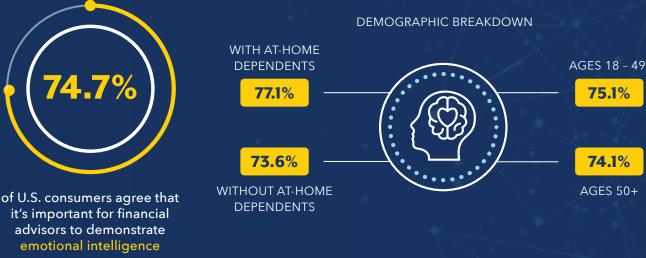
would trust a financial advisor over their friends, family or colleagues



## **EMOTIONAL INTELLIGENCE DRIVES TRUST IN** FINANCIAL ADVISORS

strengthen their relationships with American clients.

Advisors' ability to demonstrate emotional intelligence can



U.S. consumers value an advisor that hears and supports their needs.





U.S. consumers are more likely to trust an advisor who they can



increases their trust

**DEMOGRAPHIC BREAKDOWN** 

AGES 18 - 49

30.8%

that is easy to understand

#### say an advisor who primarily works with people 29.1%

26.6%

connect with and relate to.



on economic cycles and trends increases their trust say knowing someone else who works with the 24.9% advisor increases their trust

at similar income levels increases their trust

say an advisor tailoring their financial plan based

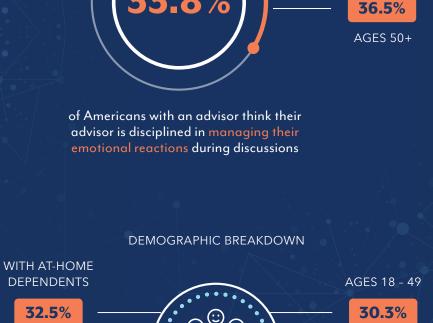
#### Of the 20.3% of U.S. consumers who have a financial advisor, many see opportunities for their advisors to improve.

AREAS FOR ADVISOR DEVELOPMENT



think their advisor is aware of their own emotions and how they affect others

of Americans with advisors





## **DEMOGRAPHIC BREAKDOWN** WITH AT-HOME

**DEPENDENTS** 

47.5%



Of the 79.7% of U.S. consumers without a financial advisor, most expect advisors to help their clients manage stress surrounding their finances.

of Americans with a financial advisor say their advisor helps them feel less stressed



AGES 18 - 49

46.3%