

SCRIPTS, STORIES, SKETCHES, SUPPLEMENTS

# 4S Framework for Effective Client Communication

Dimensional 4S Framework™ Topics

Clients have different communication styles, levels of technical understanding, and concerns about their wealth.

We have developed the Dimensional 4S Framework™ to help you personalize your client interactions using **scripts, stories, sketches, and supplements**. You can combine these distinct elements in ways that appeal to each client's perspective.

The topics below offer examples of Dimensional 4S™ training in client communication. Use them to guide your conversations and to develop and refine your approach.

Visit our [Dimensional Events](#) page to view upcoming communications workshops. To arrange Dimensional 4S™ training customized for your team, please contact your Regional Director.



Top of the page showing the URL:

The image shows a browser window with the URL <https://my.dimensional.com/collections/4s-framework> highlighted in yellow. The webpage header includes the Dimensional logo and navigation links for INVESTMENTS, TOOLS, EVENTS, WEBCASTS, and RESOURCES. A search bar contains the text "I'm looking for...". The main content area features a teal background with the title "4S Framework for Effective Client Communication" and the subtitle "SCRIPTS, STORIES, SKETCHES, SUPPLEMENTS". Below the title, there is a section titled "Dimensional 4S Framework™ Topics" with the following text:

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To the right of the text is a diagram titled "Dimensional 4S Framework™" showing a central play button icon surrounded by four colored shapes representing the framework components: Scripts (top), Stories (right), Sketches (bottom), and Supplements (left).

Bottom of the page showing the date:

## Dimensional 4S Framework™ Topics

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4S FRAMEWORK

### Crisis of the Day

Investors may become anxious about news on the economy and markets. In extreme cases, they may be tempted to change course on their investment approach. Consider using these 4S elements to reinforce a balanced perspective on high-profile events.

MULTIFORMAT | INTERNAL  
4S FRAMEWORK

### Internal Training Resources

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4S FRAMEWORK

### Stock Market Conditions

Stock returns are unpredictable. Yet, investors may be reluctant to put money to work in the market when it is at a record high or has recently declined by a relatively large percentage. Use these 4S elements to highlight the challenges with market timing, encourage appropriate expectations of returns, and reinforce a...

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4S FRAMEWORK

### Sustainability Investing

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4S FRAMEWORK

### Value of Advice

Many times, clients want to understand the value they are receiving for the fees they are paying. Learn how to use the 4S Framework to explain an advisor's crucial role in each client's financial journey and highlight the value of objective, client-focused advice.

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4S FRAMEWORK

### Global Diversification

Clients may question the benefit of holding foreign assets. This may stem from their home country market's recent strong performance relative to other markets, or may simply reflect a preference for investments in local, recognizable companies. Use these 4S elements to communicate the potential long-term...

