

# 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.



## Dimensional 4S Framework™ Topics

MULTIFORMAT | PROFESSIONAL 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 | PROFESSIONAL 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...

MULTIFORMAT | PROFESSIONAL 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.

MULTIFORMAT | PROFESSIONAL 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...

MULTIFORMAT | INTERNAL 4S FRAMEWORK

### Internal Training Resources

MULTIFORMAT | PROFESSIONAL 4S FRAMEWORK

### Sustainability Investing