

Example of Leveraging Motivational Interviewing in a Client Conversation

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Advisor: I understand you've been receiving a lot of advice from different people in your life about investing. How are you feeling about all of this?

Client: I'm confused, to be honest. My friends have made a lot of money from certain investments and they're telling me to do the same. But it feels risky and I'm not sure it aligns with my financial goals.

Advisor: It sounds like you're in a tough spot. On one hand, you're hearing about the potential gains your friends have made, but on the other, you're unsure if these investments are right for you.

Client: Exactly, I don't want to miss out on potential gains, but I also don't want to jeopardize my financial stability.

Advisor: That's a valid concern. If I'm understanding you correctly, your main goal is financial stability, correct?

Client: Yes, that's correct.

Advisor: It seems that there's a discrepancy between your main goal and the advice you're receiving. Would it be helpful if we reviewed your financial goals and compared them with the potential risks and benefits of these investment opportunities?

Client: Yes, I think that would help a lot.

Advisor: Great, let's do that. And remember, it's your decision in the end. My role is to provide you with information and guidance so you can make informed decisions that align with your financial goals.

Breakdown:

In this conversation, the advisor uses techniques from motivational interviewing to help the client explore their feelings, express empathy, highlight the discrepancy between the client's actions and goals, and ultimately guide the client towards making their own informed decision. The advisor's role is to guide and empower, not to impose a particular course of action.