

My Client Wants WHAT?: Navigating Financial Decision-Making with Our Clients

Timed Agenda [180 minutes with break]

1. Introduction of presenters, topic, and participants expectations - [5 minutes]
2. Exercise: What are the signs that your client might make a bad financial decision? *Presenters solicit input from attendees and record responses on flip chart. Presenters share additional examples and respond to attendees* [15 minutes]
3. Exercise: How do we know it's a bad decision? *Presenters solicit input from attendees and record responses on flip chart. Presenters share additional examples and respond to attendees* [10 minutes]
4. Differentiating between our biases and objective data. *Didactic discussion of self-awareness and values versus objective data.* [13 minutes]
5. Valuing the emotional leg of the stool. *Didactic discussion* [12 minutes]
6. Exercise: Identifying our biases. *Handout exploring biases related to certain common issues in family law matters. Attendees will discuss in small groups and then share responses with the whole.* [20 minutes]
7. Exercise: *Presenters ask what kinds of clients attendees imagined as they discussed (race, culture, gender, sexual orientation, socioeconomic status). Attendees discuss in same small groups how multicultural biases might influence their responses and then share responses with the whole.* [15 minutes]
8. BREAK [10 minutes]
9. Accepting clients' financial decision-making for non-financial reasons. *Didactic discussion with real-life case examples.* [35 minutes]
 - a. Processing what may be emotionally at work for clients
 - b. Identifying the role of any multicultural issues
 - c. Explore impact of decision with education
 - d. Allow time for them to think through the legal, financial, and emotional components to reflect on their priorities
10. Exercise: Role play – *handout different scenarios to small groups. Groups debrief and share with whole* [20 minutes]

11. Things to approach with caution. *Didactic discussion with real-life case examples.* [20 minutes]

- a. Waivers – what does it communicate to the client? How do we manage our fears and our liabilities?
- b. Referencing losing compared to court – what does it communicate to the client? How might it impact them emotionally?
- c. Using the professionals’ fear as a strategy to get clients to feel more fear and change their minds.
- d. Taking charge to make decisions for a disadvantaged spouse – what does this communicate to the client?

12. Concluding debrief. [5 minutes]