

MARKET VOLATILITY

DIGITAL MARKETING TALKING POINTS

UNDERSTANDING MARKET VOLATILITY

- When markets become more volatile, what are some of the first conversations you have with clients?
- From your experience, what tends to cause people the most concern during periods of market volatility?
- How do you explain market volatility to someone who is feeling uneasy about recent market movement?
- What is a common misconception people have about market downturns or corrections?
- What lessons about market behavior do you wish more people understood?

1. BEHAVIOR AND DECISION-MAKING

- Why can emotional decision-making be so impactful during periods of market volatility?
- What are some of the most common mistakes investors make when markets decline?
- How do you help clients stay focused on their long-term plan when short-term movement feels overwhelming?
- What is one mindset shift that can help someone navigate market uncertainty more confidently?
- How do you help clients avoid making reactive decisions during volatile markets?

2. PLANNING AND STRATEGY

- How do you help clients distinguish between normal market fluctuations and situations that may require adjustments?
- What role does diversification play during unpredictable markets?
- How do you prepare clients ahead of time so they are not reacting out of fear when markets decline?
- What does it mean for a financial plan to be “built for volatility”?
- How often should someone review their portfolio to make sure it is still aligned?

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3. RISK AND ALIGNMENT

- How can someone tell if they are taking more risk than they realize?
- What is risk drift, and why does it matter during market volatility?
- If someone has not reviewed their portfolio in a while, what should they be looking for?
- How do you help clients understand whether their current strategy still fits their goals?
- What is one question every investor should ask themselves during volatile markets?

4. RETIREMENT AND INCOME CONSIDERATIONS

- How does market volatility impact someone who is close to or in retirement differently?
- What role does income planning play during periods of market uncertainty?
- How can having a defined income strategy help reduce stress during market swings?
- What is sequence of returns risk, and why does it matter in volatile markets?
- How do you help clients plan withdrawals during down markets?

5. OPPORTUNITY AND PERSPECTIVE

- Can market volatility ever create opportunities for investors?
- How do you help clients reframe volatility as part of the process rather than something to fear?
- Have you seen a client's perspective change after experiencing volatility with a plan in place?
- What is one positive takeaway people can have from market downturns?
- How do you help clients focus on what they can control during uncertain markets?

6. CLOSING/CALL TO ACTION PROMPTS

- If someone is unsure about their current plan, what is the first step you would recommend?
- How can someone evaluate whether their plan is prepared for market volatility?
- What would you say to someone who has not reviewed their strategy in several years?
- How can a simple review help provide clarity during uncertain markets?
- What is the value of having a second opinion during periods of market volatility?

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SUGGESTED CALL TO ACTION OPTIONS

- Invite viewers to take the Risk Assessment Quiz
- Direct viewers to review the Volatility Readiness Checklist
- Offer a complimentary planning conversation
- Encourage a portfolio or risk review

FINAL GUIDANCE

Keep messaging calm, clear, and practical.

The goal is to help viewers better understand how market volatility fits into a long-term plan, while naturally guiding them toward a conversation or next step.