

Title: What's an Ism?

David Richman: What's an ism? Isms, think of them as what you know to be so. Your truisms, aphorisms, not what you know to be so about the work you do with your clients. Think of it at a higher level. What are the things you fundamentally believe that the clients that you serve and hope to serve need to understand and live by in order to be successful in their financial lives?

You likely have isms related to investments, isms related to planning, isms related to estate planning. We urge you to work on your isms. It can help you capture referable moments and it can help us help you figure out how to articulate what it is that makes you so special, help you discover your unique brand.

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