



AQUILA  
GROUP OF FUNDS®

# TEN TIPS FOR CONNECTING WITH OLDER CLIENTS

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- 1. Establish Trust First** Older individuals are relationship-oriented. Take the time to show that you truly care about your older client. As Teddy Roosevelt said “nobody cares how much you know, until they know how much you care.” On occasion, give a small, thoughtful gift or take him/her out for a meal. The cost is not important; it is the thought (i.e. take a recent widow out for lunch on her birthday).
- 2. Display Patriotic Symbols** Wear an American flag lapel pin. It is a subtle but powerful value symbol, particularly for the generations that fought in World War II and Korea.
- 3. Carry a Wide Barrel Pen** It is easier for an older adult to use. Arthritis affects 50% of people over the age of 65. Squeezing hard when shaking hands could cost you business.
- 4. Display Pictures of Your Children or Grandchildren** Talk about them. More than 80% of people over age 60 are grandparents and a third are great grandparents. Funding for college education is a reasonable goal for grandparents.
- 5. Keep a Small Pillow in Your Office** Many older people use a chair pillow to support them when they are sitting. Leave one on a chair they are likely to sit on. If they ask what it is for, tell them you use it occasionally and they are welcome to use it. Avoid commenting on their limitations.
- 6. Don't Call Them “Senior Citizens”** About one-third don't like that term. In fact, don't use any labels when talking with them. If you must, refer to them as “people like yourself”.
- 7. Understand What Age They Think They Are** Chronological age does not match cognitive age (the age people feel they are). Most older people see themselves as 15 years younger than their actual age.
- 8. Create a Positive Physical Environment** Eliminate glaring outdoor and internal lighting. Reduce background noises. Don't seat them in a drafty area, such as near a heating or air conditioning vent. Note that hearing and vision loss affects many older people.
- 9. Use Metaphors** When describing financial products, use figures of speech, such as metaphors: “Financial Planning is like going down a river in a boat. Sometimes it's rough; other times it's smooth. Sometimes there are rocks (or difficulties) ahead to be avoided”.
- 10. Draw Them a Picture** As people age, they remember things much better from what they see than from what they hear. Draw it out for them. Use icons or pictures such as nest eggs, trees, scales, and/or seesaws to help illustrate abstract ideas. Reinforce by writing key words that will also serve as visual clues.