FOUNDATIONS · RESOURCE 13

Visual Tools and Pacing

TL;DR · QUICK SUMMARY

- People process information in different ways.
- Visual tools can help make complex financial concepts easier to understand.
- Slowing down discussions can improve comprehension and confidence.
- Effective pacing creates space for reflection, questions and informed decision-making.

A Note Before You Read On

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Why This Matters

Financial planning often involves concepts that are difficult to visualise.

Investment strategies, retirement planning, cash flow forecasting and protection planning can all feel abstract to clients.

Visual tools and thoughtful pacing can help make information more accessible and meaningful.

What This Might Look Like

A client may:

- Understand visual explanations more easily than verbal ones.
- Need additional time to absorb complex information.

- Prefer diagrams, charts or summaries.
- Become overwhelmed during lengthy meetings.
- Ask for clarification after a discussion has finished.

What You Can Do

1. Use Visual Supports

Consider:

- Diagrams.
- Timelines.
- Flowcharts.
- Process maps.
- Visual summaries.
- Decision trees.

2. Pace Conversations Carefully

- Pause regularly.
- Check understanding.
- Avoid rushing complex discussions.
- Allow time for questions.

3. Encourage Reflection

Not all decisions need immediate answers.

Give clients time to process and return to discussions where appropriate.

Helpful Phrases You Can Borrow

You don't have to use these exact words — take what fits and leave the rest.

> "Would it help if I mapped this out visually?"

> "Let's pause here and make sure everything feels clear."

> "Take your time. There's no expectation to make a decision today."

Quick Tips

- Visuals can support understanding.
- Avoid information overload.
- Pause regularly.
- Encourage questions.
- Allow processing time.
- Tailor approaches to individual clients.
- Focus on clarity, not speed.

Before You Go

Financial planning isn't a race.

The most effective conversations are often the ones where clients feel they have the time and space to think, reflect and understand.

When people feel less rushed, they are often better able to make decisions that align with their goals.