

# Care For Your Clients Without Burning Out

## 10 TIPS FOR TAKING CARE OF YOUR MENTAL ASSETS

### 1 Pick the Right “Stalks” & Hydrate Regularly

Eat a balanced diet to maintain energy throughout the day



### 2 Check Your P/E (Physical Exercise) Ratio

According to CMHA, “regular physical activity improves psychological well-being and can reduce depression and anxiety.”



### 3 Invest in Your Rest

Try setting a sleep alarm and go to bed at the same time every night for restorative sleep

Experts agree that screens should be off 2 hours before going to bed – try reading or meditating before bed instead



#### DID YOU KNOW?

- Before the invention of the light bulb, people slept on average 10 hours/night
- North Americans average 6.9 hours of sleep on weeknights, but need 7.9

### 4 What’s YOUR Plan?

#### Control the controllable

- By planning & setting goals, you’ll be ready for your day despite any market or client volatility

#### OUT OF OUR CONTROL

- The weather
- The markets
- Attitude of others
- Illness

#### WITHIN OUR CONTROL

- How we respond & communicate
- Preparation for client interactions
- Scheduling appointments with enough time to address issues



### 5 Take a Pre-Authorized Mental Break (PAMB)

Schedule 5-minute walks – get some fresh air

#### DID YOU KNOW?

- 9/10 Canadians report feeling happier after spending time in nature
- 88% of Canadians report spending time in nature alleviates stress & helps them focus on work
- Office staff find several 5-min walks more beneficial than one 30-min walk – Greater happiness, less fatigue, less food cravings



Sources: 2018 Ipsos-Reid survey, University of Colorado Anschutz Medical Campus and the Johnson & Johnson Human Performance Institute, 2016

## 10 TIPS FOR TAKING CARE OF YOUR MENTAL ASSETS

### 6 “Lien” on Policies & Procedures

Use policies and procedures to set professional boundaries

- Respectful workplace policies, client behavioural agreements, human rights code

Offer alternatives to colleagues or clients when the healthy answer is “no”

- e.g., “With that timeline, I will not be able to help you, but I can connect you with a person who may be able to assist.”



### 7 Reduce Volatility

Always pause before responding

Respond don't react



### 8 The Bottom Line on Breath

Don't forget to breathe!



### 9 Rebalance: Evaluate & Debrief

Take time to evaluate and document difficult encounters with clients

Debrief with your team, colleagues or corporate roundtable

Seek counselling when needed



### 10 Mindfulness: A Share of Your Own Headspace

Meditation & mindfulness programs have been shown to reduce the multiple negative dimensions of psychological stress



Source: Goyal et al, 2014. Meditation Programs for Psychological Stress and Well-Being. Comparative Effectiveness Reviews, No. 124

## PROMOTING INVESTOR & ADVISOR WELL-BEING



Canadian Mental  
Health Association  
Toronto



**BRIDGEHOUSE**  
ASSET MANAGERS

Watch our *Mental Health & The Financial Advice Relationship* webinar series for insights, tips and strategies. Visit [bridgehousecanada.com/mental-health](https://bridgehousecanada.com/mental-health).

FOR INFORMATIONAL AND EDUCATIONAL PURPOSES ONLY. Bridgehouse Asset Managers® is a trade name of Brandes Investment Partners & Co. (Bridgehouse). The Canadian Mental Health Association-Toronto (CMHA) logo is used with the permission of CMHA. The information has been gathered from sources believed to be reliable; however, Bridgehouse is not responsible for any errors or omissions contained herein. Bridgehouse assumes no liability for any loss or damage suffered as a result of the use, misuse or reliance on the information and content herein. This material is not intended to provide legal, financial, medical or other advice, and may not reflect the thoughts and opinions of Bridgehouse. Information provided is not a substitute for professional advice. If you feel that you may need medical advice, please consult a qualified health care professional. Published July 2019. FOR REGISTERED DEALERS AND THEIR REGISTERED SALESPERSONS' USE ONLY. NOT FOR DISTRIBUTION TO INVESTORS.