



**WEALTHSPIRE**  
ADVISORS

# Motivational Interviewing

---

**FTI Annual Conference, West Palm Beach**  
**Wednesday, Nov 12**

# Consider a change...

---

Think about a change you've considered making

1) Why would you want to make this change?

2) If you did decide to do it, what approach would help you succeed?



3) What would you say are the three best reasons for you to do it?

4) On a low to high scale from 1 - 10, how important would you say it is for you to make this change?



What do you think you'll  
do?





## What is MI?

A way of talking with people about change and growth to strengthen their own motivation and commitment



# Introductions

---

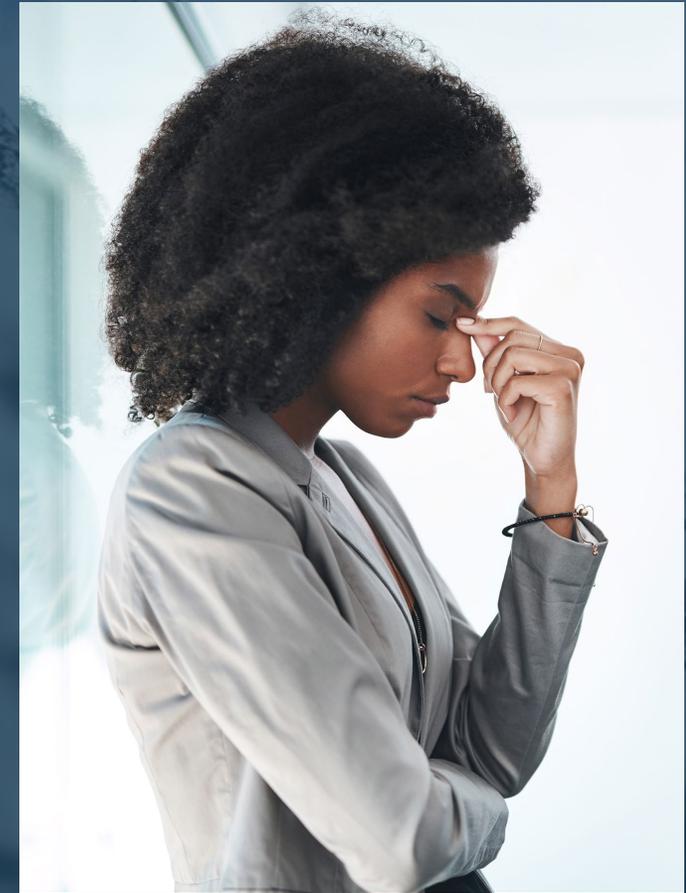


Derek Hagen, CFA, CFP®, FBS®, CFT™  
Life Planning Consultant  
True Wealth™ Trainer with Money Quotient

B. Kelly Keydel, CFP®, MBA, CDFA®, CeFT®  
Managing Director, Advisor  
Wealthspire Advisors



Laura Barry, CFP®, CeFT®  
Managing Director, Advisor  
Wealthspire Advisors



---

Ann

# The Basics

---

The Guiding Spirit

The Tasks or Stages

Ambivalence

# The Guiding Spirit

---

## A Way of Being

- ❖ Partnership  
Clients are the experts on themselves
- ❖ Acceptance
- ❖ Compassion
- ❖ Empowerment  
Evoking not installing

MI is not  
about  
installing  
motivation,  
but  
evoking it

---

# The Stages

---



Engaging

Can we walk together?



Focusing

Where are we going?



Evoking

Why would you go there?



Planning

How will you get there?

# Ambivalence



# The Delivery

---

Skills: Strategic Reflective Listening – OARS

# Strategic Reflective Listening - OARS



## Open Questions

An invitation to say more

Active engagement, forward momentum



# Strategic Reflective Listening - OARS



## Open Questions

An invitation to say more

Active engagement,  
forward momentum



## Affirmation

Noticing and  
Appreciating

Simple

Complex

Avoid 'I' – them not you



# Strategic Reflective Listening - OARS



## Open Questions

An invitation to say more

Active engagement,  
forward momentum



## Affirmation

Noticing and  
Appreciating

Simple

Complex

Avoid 'I' – them not you



## Reflection

I heard you

2:1

Mirroring



# Strategic Reflective Listening - OARS



## Open Questions

An invitation to say more

Active engagement,  
forward momentum



## Affirmation

Noticing and  
Appreciating

Simple

Complex

Avoid 'I' – them not you



## Reflection

I heard you  
2:1

Mirroring



## Summarize

Focused attention on  
a particular aspect

Collected reflections  
with context

Periodic

# The Delivery

---

Speech: Recognize and Support Change Talk – DARN CATS



## Recognize and Support Change Talk

---

**D** Desire

**C** Commitment

**A** Ability

**A** Activation

**R** Reasons

**TS** Taking Steps

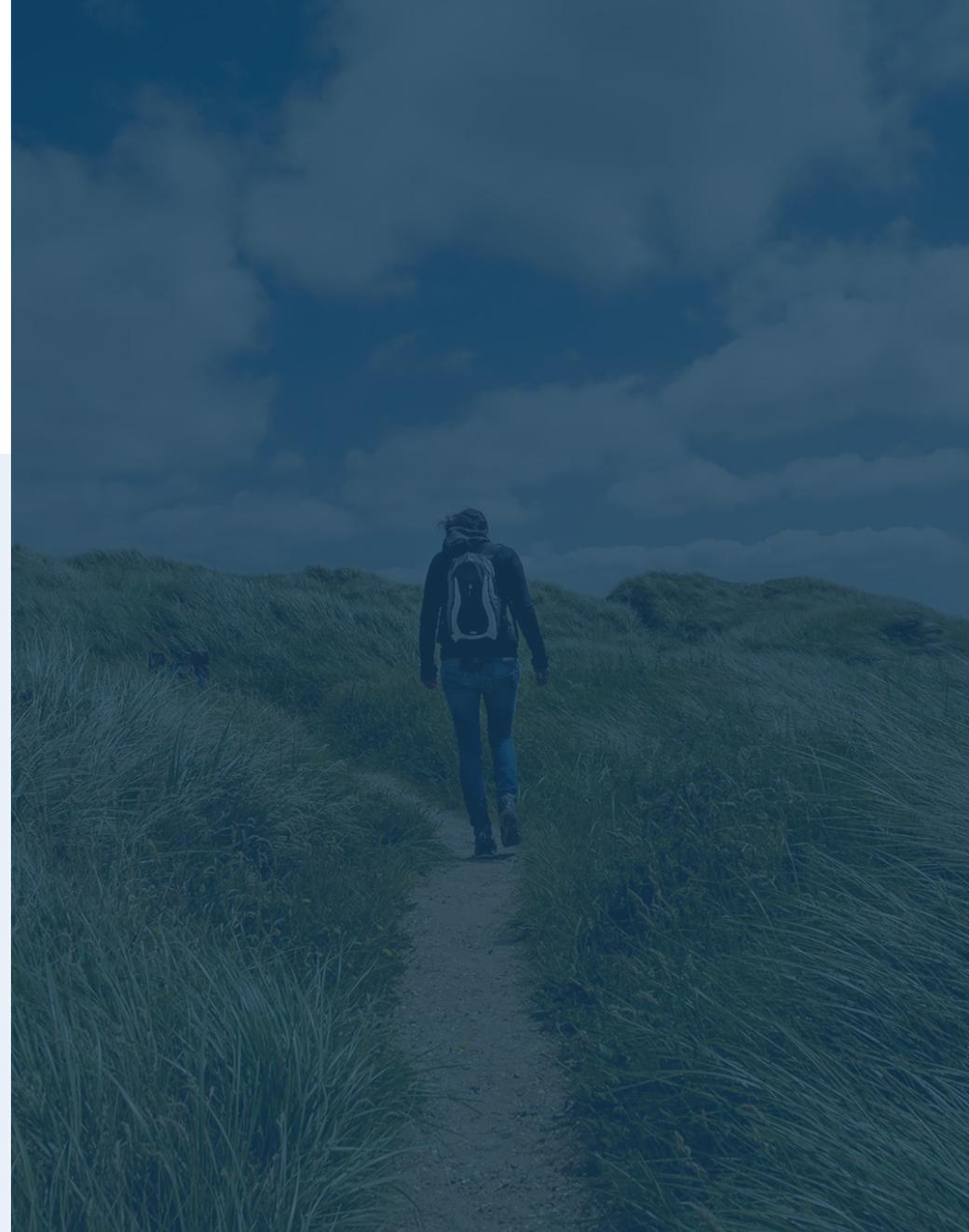
**N** Need

# Motivational Interviewing

---

A way of talking with people about change and growth to strengthen their own motivation and commitment

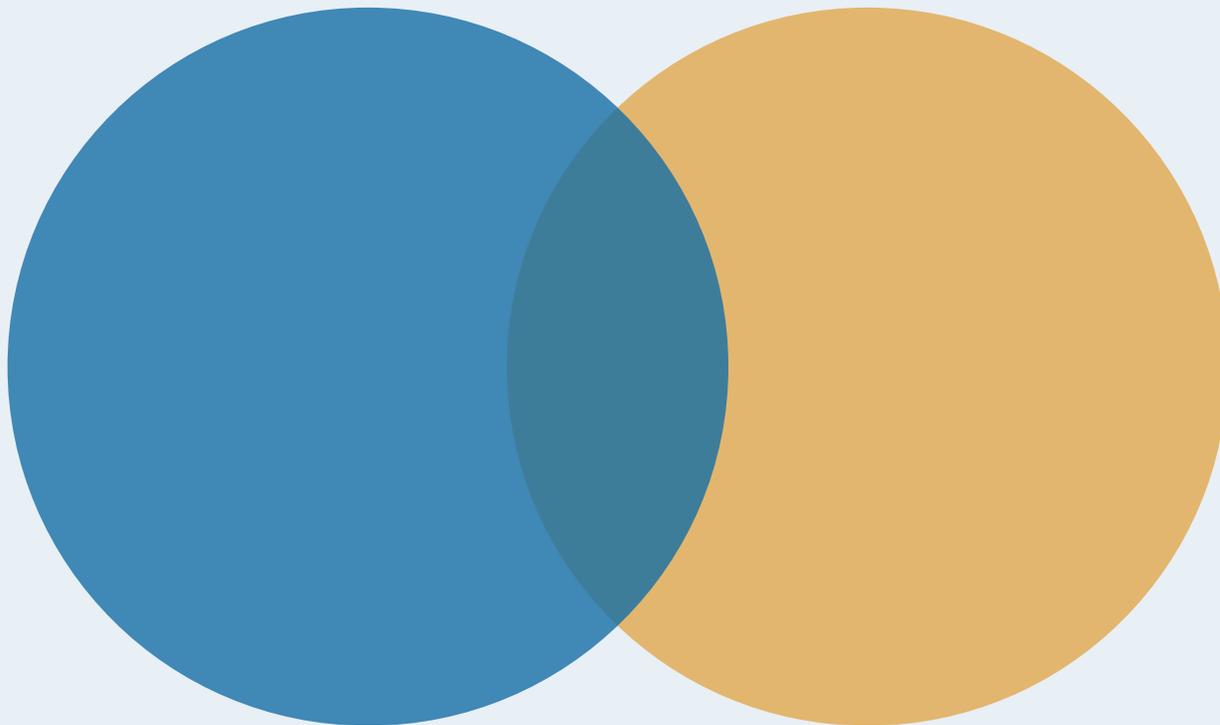
- The Guiding Spirit
- Strategic Reflective Listening with OARS
- Listening, Asking for, and Supporting Change Talk



# Motivational Interviewing Supports Transition Work

---

## A Way of Being



- Evidence Based
- Person Centered – The Client is the expert in themselves.
- Listening well – *Strategic, reflective*
- Perspective – Support in seeing from the Balcony
- Give the work back – evoking motivation

# Training Options

Most Comprehensive

## 8-Week Bootcamp

Self-paced training to help you understand MI and build MI skills to apply in real client conversations. Features weekly video lessons and reflection exercises.

- Ideal for advisors who want a deep-dive into MI
- Includes scripts, tools, and guided exercises

[See Upcoming Trainings](#)

Most Hands-On

## Advanced Intensive

A live, skill-focused practicum designed for advisors ready to deepen their MI proficiency. Features live practice, peer feedback, and real-play observation.

- Best for advisors with prior MI experience
- Focused on application and real-time coaching

[See Upcoming Trainings](#)

Fast-Track

## 4-Hour Workshop

A concise, interactive introduction to MI principles — ideal for events, retreats, or new teams. Learn foundational skills you can use immediately.

- Great for shared team learning
- Builds early awareness and quick wins

[See Upcoming Trainings](#)

Tailored

## Custom Firm Training

Fully customized programs built around your firm's client model, team dynamics, and goals. Delivered on-site or virtually.

- Discovery and design process included
- Optional ongoing feedback and observation

[Start a Conversation](#)