Advisor Self-Reflection Toolkit

Transference, Boundaries, and Better Conversations

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1. Post-Meeting Counter-Transference Journal Prompts

Complete within 10 minutes of the meeting while details are fresh.

- What emotion am I leaving with? (Calm, stressed, energized, irritated, protective, drained)
- Did I avoided giving advice I believe was in their best interest?
- Did I push harder than they were ready for?
- Where did my reaction feel bigger than the moment?
- Was I reacting to *this client* or someone they reminded me of?
- If I could redo one moment in this meeting, what would I change? Why?

Goal: Identify patterns over time — repeated triggers, common client archetypes, and situations that activate them.

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2. "Who Do They Remind Me Of?" Exercise

Use before high-stakes conversations or when you feel strong emotions toward a client.

1. Write the client's name at the top of the page.
2. Ask yourself: *Who do they remind me of?*
3. List 3–5 similarities (tone, mannerisms, life stage, story).
4. List at least as many differences. (How they are *not* that person.)
5. Re-read the differences before the meeting.

Why it works: This breaks the unconscious mental "bucket" and re-anchors you in the client's actual identity.

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3. Self-Check Protocol for Emotional Regulation During Meetings

Quick reset steps you can use in the room without breaking the flow.

Step 1 — Breath Check:

- Notice your breathing. If shallow or fast, take one slow, full inhale and exhale.

Step 2 — Body Scan:

- Shoulders, jaw, hands — is there tension? Release it.

Step 3 — Name the Feeling (Silently):

- "I'm feeling protective." / "I'm feeling irritated." / "I'm feeling rushed."

Step 4 — Micro-Pause:

- Take a sip of water, review notes, or shift posture — small actions to reset.

Purpose: Creates a moment of awareness before reaction, reducing the pull of counter-transference in the moment.

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4. Partner Feedback Prompts *(If Working With a Team)*

Builds accountability and helps surface blind spots.

Before the meeting:

- "If you see me avoiding a topic or going soft on an important point, note it."
- "Watch for any shifts in my tone or posture when we hit sensitive topics."

After the meeting:

- "Did you notice me holding back or pushing too hard?"
- "Did my emotional tone match the client's needs?"
- "What, if anything, would you have handled differently in that moment?"

Tip: Rotate roles so feedback is mutual — both partners practice awareness and receive constructive input.

Closing Note:
Awareness is a skill you build with repetition. The more you track your reactions, challenge your assumptions, and invite feedback, the less your past will unconsciously steer your advice — and the more your clients will feel seen for who they truly are.