

Ten Questions to Ask to Build Deeper Client/Prospect Relationships:

1. What do you feel really good about in your financial life?
2. What could be even better?
3. Tell me more about that?
4. What else?
5. It really helps me work with people when I understand how money has impacted them and played a role in their lives. What is your earliest memory involving money?
6. How was (or wasn't) money talked about in your home growing up?
7. You know, I was thinking about something this morning that I was grateful for (and then share with them). What are you feeling grateful for?
8. If it were 2 years from now, how would you know you were really thrilled with our working relationship?
9. Imagine what your life could be like in 5 years? Tell me about it? Where are you living? What type of work are you doing? How are you feeling? Paint a picture for me.
10. What questions do you have for me? (Notice you've asked "what questions do you have for me," not "do you have any questions." This leaves room and space for them to ask.)