Discovery Questions
For Clients and Prospects

To make your client and prospect meetings the most effective they can be, you need to go beyond traditional fact-finding and ask feeling-based questions. These types of questions allow you to connect with people and help build trust, rapport, and loyal relationships.

As you talk to clients and prospects about taking action by implementing the recommendations you make, refer back to the information you uncover through these questions.

Follow These Steps to Build Better Discovery Questions Into Your Meetings

1. Select the questions you will ask during data-gathering or first appointments with prospects.
2. Select the questions you will ask during client review/update meetings.
3. Add additional questions to this list you would like to test in future meetings.

Introduction

» What would you like to accomplish in our meeting today?

» If you could develop, improve, or change your financial life in any area, what would it be?

» What's the number one financial issue you'd like help with right now?

Background

» Tell me a little about your background: Where are you from? How did you get into your present career? Tell me about the people (or animals) you care most about.

» Tell me about what you enjoy doing in your free time.

» What did money mean to you and your family growing up?

» Do you have any fears when it comes to money?

» What kind of experiences have you had working with financial advisors or other financial professionals?

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Present

- How happy are you with your financial progress?
- Where do you get most of your financial education and advice from?
- Who do you consult before making important financial decisions?
- How confident are you that you're in position to meet your financial goals?
- Do you have a current financial plan in place that addresses what matters most to you?

Vision

- What's your vision of your future?
- If money was not an issue, what would your ideal lifestyle be? Where would you live? With whom would you surround yourself?
- If you had all the money you ever needed, what would give you purpose and motivate you throughout the day? What's your vision of a worry-free retirement?
- As you think about retirement or your financial future, what emotions do you feel?
- What impact would you like your estate to have after you're gone?

Values

- What do you care most about in life?
- Tell me about a few of the things you value most in life.
- What did/do you teach your children about the value of money?
- Were there any events in your life that had a big impact on your values about money today? How do you define success?
- If you could pass on one secret to life to all future generations, what would that secret be?

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Objectives

- Are you confident, in the event of your death, the people and things you care most about would be protected financially?
- What challenge, opportunity, or goal do you have, that if you took action, would make you feel better? What's the consequence of not taking action toward your goals?
- What have you liked about other advisors you've worked with and what qualities haven't you liked?
- What needs to happen over the next few years in order for you to feel our relationship has been successful?

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