



How to Get Clients to Open Up



To get meaningful answers, ask great questions.

When meeting new or prospective clients, ask open-ended questions to understand their financial needs. These questions encourage clients to share meaningful information and create an open dialogue.

Help get the conversation going by asking:

- **Who** have you used for investment advice in the past?
- **Who** else is involved in your decision-making process?
- **What** brought you to the bank today?
- **What** do you like the most and least about your portfolio?
- **What** are your retirement goals?
- **Where** do you find financial information and advice?
- **Where** else do you invest or bank?
- **When** do you plan to retire?
- **When** do you expect to start taking income from your investments?
- **Why** do you bank here?
- **Why** are you looking for a financial advisor?
- **How** have you made financial decisions in the past?
- **How** would you describe yourself as an investor?
- **How** should I follow up with you?
- **Tell** me about your best and worst investment experiences.
- **Tell** me about your last investment advisor.
- **Tell** me how much risk you are willing to accept.

**Opened-ended questions can help you learn about your clients' financial needs.
This will help you recommend the best product for them.**

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Page 2 of 2