

40 OPEN-ENDED QUESTIONS TO ENGAGE YOUR CLIENTS

Good questions have the power to engage and build rapport and trust. Being a good question asker does not come naturally and it is a skill that we need to learn and practice to build better question asking habits.

As you engage your clients and listen to their hopes and fears for retirement, asking good, open-ended questions can help your clients reflect on their goals as well as identify ways to move toward achieving them. Doing so will deepen their commitment to the financial planning process and increase their motivation to take action.

Need help coming up with questions to ask? U 40 great questions to engage and motivate your clients!

CONNECT 1

- What do you hope to accomplish in this meeting?
- What would need to happen for you to finish this meeting feeling that this was time well spent?
- What does retirement success look like to you?
- What does financial success look like to you?
- What are you willing to do to have retirement success?
- What are you willing to stop doing to have retirement success?
- What have you tried so far?
- What has worked?
- What hasn't worked?
- What are the opportunities?
- What are the challenges?

INTERNALIZE 2

- What are your top financial goals for this year?
- What are your top financial goals for the next 5 years?
- How confident are you in your ability to reach these goals?
- How will you know when you've reached this goal?
- What actions have you already taken towards this goal?
- What's the first step you need to take to reach your goal?
- How much control do you have over your retirement goals?
- What will you have to give up in order to make room for your goals?
- Who else will benefit from this action?

INITIATE 3

- What could you do differently?
- What possibilities do you see?
- Can you think of one more possibility?
- How do you feel about the options?
- Would you like a suggestion from me?
- Of the things we have discussed, which are of most interest to you?
- What resources or information do you need to help you decide?
- How can you find the information?
- Would you like to take action on one of these options?
- What are you willing to commit to here?
- What is holding you back from taking action?
- Are you procrastinating or is there a reason to delay?
- What's steps do you need to take to accomplish this action?
- Is this something you need to do or can you delegate it?
- When will you start?
- Is there anyone else you would like input from?
- What can I do to help?
- What am I not asking you that you really want me to ask?
- Is there anything else you want to talk about in this meeting?

