eMoney Advisor

60 Great Questions…

… to Discover Your Client's Deepest Motivations

Here are 60 questions that will help you uncover what truly motivates your Client. There are two reasons why you want to learn what truly motivates your Client: (1) So you can design a plan that meets your Client's deepest needs; (2) So you can use this information to motivate your Client to implement your recommendations. Read all 60 questions. Check those that you think would work best for you. Try a few that are outside your comfort zone. You might be surprised what you learn by asking questions you have never asked before.

Legacy Questions

1. Who are you financially responsible for?
2. Who is important to you that you may have to assist financially?
3. What kind of legacy do you want to leave?
4. What kind of role do you want to play in your children's / grandchildren's future?
5. How do you plan on taking care of your children if something happens to you?
6. Tell me about your philanthropic intentions.
7. Tell me about your kids/family.
8. What kind of legacy do you want to leave after you have taken care of your family?
9. What are your plans for your family?
10. How do you want to be remembered?
11. What's important to your spouse and children?

Retirement Questions

12. What do you want your retirement to look like?
13. What kind of retirement lifestyle do you want?
14. Why is it important to retire at age ______?
15. What is your retirement dream?
16. Where would you send a postcard from and what would you write (during retirement)?
17. How will your retirement differ from your parents' retirement?

Health Questions

18. Share with me any health concerns or issues (personal / family) you have.
19. What plans have you made in the event that you become disabled?
20. Tell me about the provisions you've made for long-term care.

Experience Questions

21. How did you get where you are today?
22. What's your experience with money?
23. What have your past investment experiences been like?
24. How did you get into this business?
25. How did you make this money?
26. In your prior financial experiences, what were your proudest moments? Biggest regrets?

eMoney Advisor

60 Great Questions…

…to Discover Your Client's Deepest Motivations

General Questions

27. What keeps you up at night?
28. What do you enjoy doing outside of office?
29. What goals have you set for yourself now?
30. What's important to you about your money?
31. What is important to you about life?
32. What does Financial Planning mean to you?
33. What traits are you looking for in your planner?
34. Tell me more about your goals…
35. What scares you about your current financial situation?
36. How can I help you?
37. Who is your primary financial institution?
38. Who do you do business with? Why?
39. Tell me about your experience with other advisors.
40. What are you trying to accomplish? What are your primary goals?
41. How do you like to access / manage your money?
42. What are you looking for in an advisor?
43. What projections have you done so far?
44. What are you most passionate about?
45. If you are not on track, what are you willing to change to get back on track?

Second Level Questions

You do not always uncover your Client's deepest motivations with just one question. So be prepared to ask a follow up question. Keep it simple. Show your sincere interest in what your Client is saying by saying something like: "Tell me more…" "Tell me more about it…" "What does that mean to you?" "Can you help me prioritize all of the goals you have shared with me?" "What do you mean by that?" "Explain…" "Why?"

46. Tell me about your family…
47. How important is it to you to protect your money from the IRS?
48. What is the money for?
49. What are your short-term, mid-term, and long-term goals?
50. What are your concerns?
51. How do you define "risk"?
52. Who else should be involved in this process?
53. What's important about ___________ to you?
54. What do you want from this process?
55. Where do you want to see yourself in __ years?
56. If money were no issue, what would you do with your time?
57. What are your expectations (of me, this process, this experience, etc)?
58. What is the most important thing I can do for you?
59. Why are you here? Why is that important to you?
60. What is really important to you that we didn't discuss today?