

5 Discovery Questions to Connect with Clients

Build Meaningful Relationships with a Defined Process

#1. What do you like to do in your free time?

Why We Ask This Question: This question helps you understand some of the prospect's potential values and goals and will possibly help you find common ground with similar interests. Discovering common ground with your prospect creates a natural relationship filled with trust and mutual understanding. This question can be the foundation of a long-lasting relationship helping you better serve the prospect in the future.

#2. What is your family like? Do you have children, grandchildren, nieces, and nephews?

Why We Ask This Question: This question helps you to connect on a personal level, possibly find common ground, and identify if they value family. It is important to know who inspires the client to excel in their career. Use this question as an opportunity to identify family member names and titles that can be recalled in future conversations.

#3. Do you currently support any non-profits? If so, can you tell me more about these organizations?

Why We Ask This Question: This question will help you gain credibility with the prospect as a major value question that provides insight into his/her values. Understand how to best serve the client and meet his/her needs moving forward in the relationship.

#4. What would you say is one of the best financial decisions that you've made in your life?

Why We Ask This Question: Asking this question puts the focus back on the prospect, giving him/her another opportunity to talk about something they did well. This positive emotion helps open a door into the past and provides insight into their financial principles. This question may motivate the client to tell you about the worst financial decision that they've made.

#5. What are some of your specific financial goals?

Why We Ask This Question: This question gives the prospect the opportunity to share his or her values to better understand the goals he/she would like to achieve in the partnership. You want to make sure that you are identifying very specific targets inside this question that can be referenced in your proposed plan.
