Game-changing conversations

NORTH AMERICAN[SM]
A Sammons Financial Company

	Partner 1:	Partner 2:
What are you seeking from a financial professional?		
What are your expectations following the first meeting, second meeting, etc.?		
What role do you have within your household finances?		
What factors affect how and why you make financial decisions?		
What is your biggest non-financial concern?		
How do you prefer to communicate?		
When do you prefer to communicate?		
Who do you prefer I communicate with?		
Is there anything else that would be helpful for me to know?		

These questions validate each of their individual concerns and give you insight as you work to find a potential solution. Don't forget to document their responses, and use them to help strengthen these new relationships later on.

While lengthy, adding this extra step into your initial meetings will remind you to look at each client individually, without assumptions.