

Asking trilogy questions to uncover emotional and economic concerns

Habits of highly effective financial professionals

Knowing the right questions to ask is a skill that can put clients at ease and provide you with the information to help them reach their goals.

Focus on what matters to them

Start by asking open-ended questions that require a three-part answer. These “trilogy” questions may open the door to a larger discussion of their deep-seated concerns and uncover opportunities for you to address. This exchange will show clients you really want to understand their needs, goals and expectations.

The main objective is to open the conversation broadly so you can drill down on each issue. Here are examples of trilogy questions:

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| 1. What are three things you wish were different with your current financial professional? | 5. What are three things you're most concerned about related to getting your financial life in balance? |
| 2. What are three things you are most concerned about regarding retirement? | 6. What are three things you would like to do for your family's future financial security? |
| 3. What are three things you want to accomplish with your money as part of your life's legacy? | 7. What are three financial issues you're concerned about that we haven't discussed? |
| 4. What are three areas of financial planning that you're most concerned about? | 8. What are three other things we could do to strengthen our relationship with you and your family? |

You can drill down further to learn more by using these additional probes:



- I understand. Why is that so important to you?
- What else can you tell me about that?
- Could you give me some details or examples?

Strengthen relationships over time

Asking well-thought-out and probing questions is a great way to help establish a long-term relationship with your clients and their family. Digging deep and personalizing your conversations can become second nature and keep your clients happy with you as their financial professional.



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