

Three Questions for CLIENTS



01 Is there anything we're not doing for you, that we could be doing, that you would find helpful or valuable?

02 What are the top 2 or 3 things we do for you that are the most valuable to you?

03 Is there anyone in your life that could use help with {INSERT THE 2 OR 3 THINGS THEY JUST SAID} - we would really appreciate it if you could facilitate an introduction?

Veronica Karas, CFP
Senior Financial Advisor



Three Questions for PROSPECTS



01

Is there anything we didn't cover during this meeting, that we could have covered, that you would find helpful or valuable?

02

What are the top 2 or 3 things that we discussed today that are most valuable to you?

03

Is there anyone in your life that could use help with {INSERT THE 2 OR 3 THINGS THEY JUST SAID} - we would really appreciate it if you could facilitate an introduction?

Veronica Karas, CFP
Senior Financial Advisor



Three Questions for COIs



01

Is there anything we're not doing for your clients, that we could be doing, that you would find helpful or valuable?

02

What would you say are the top 2 or 3 things we do for your clients, that you find most valuable?

03

Is there anyone in your life or from your clients we haven't met yet that could use help with {INSERT THE 2 OR 3 THINGS THEY JUST SAID} - we would really appreciate it if you could facilitate an introduction?

*Veronica Karas, CFP
Senior Financial Advisor*

