*Presentation:*

Follow Up Questions – 17 Follow-Up Questions to Enrich Client Conversations

*Presenter:*

**Meghaan Lurtz, Ph.D., FBS™**    
  
Dr. Meghaan Lurtz is a leading global expert on the psychology of financial planning and a Partner at Shaping Wealth. A dedicated educator, she is a Professor of Practice at Kansas State University, teaching in the Advanced Financial Planning and Financial Therapy Certificate Programs. She is also a lecturer at Columbia University, where she teaches Financial Psychology. She serves on multiple financial technology boards, bringing together finances and mental health. She is an active researcher, writer, and ongoing contributor to the [Kitces.com](http://kitces.com/) platform, writing about the intersection of money, advice, and wellbeing. Meghaan has finished her Ph.D. in Personal Financial Planning at Kansas State University. Meghaan is a past President of the Financial Therapy Association.

*Session Description:*

Rapport building is pivotal groundwork for a trusting relationship. One sure fire way to build rapport and ultimately trust is by asking follow-up questions. In this presentation, advisors will learn why follow-up questions are so powerful for trust and connection. They will also learn about varied forms of follow-up questions and how to use those forms in the varied financial planning meetings, specifically introduction meetings, discovery meetings, and plan presentations meetings. Utilizing follow-up questions to strategically build rapport and trust in the early stages of a new financial planning engagement.

*Learning Objectives:*

* LO #1: Identify what is going on in the brain when we ask follow-up questions
* LO #2: Define the “true” follow-up question
* LO #3: Review the connection between asking true follow-up questions and active listening
* LO #4: Review varied structures of follow-up questions
* LO #5: Identify how to use different types of follow-up questions based on the financial planning meeting

*Level of Complexity:*

* CFP / IMCA: Advanced
* NASBA: Basic

*How hours are determined:*

- Length of presentation – 50 minutes

*Topic Areas:*

* CFP: Financial Planning Process
* NASBA: Specialized Knowledge (Personal Financial Planning)

*Hour(s) of CE:*

* CFP: 1.0
* IMCA Financial Planning: 1.0
* IMCA Tax & Regulations: 0.0
* IMCA Ethics: 0.0
* NASBA (CPE/CE/CFP): 1.0
* EA: 0.0
* NASSA: 1.0

*Outline:*

Identify what is going on in the brain when we ask follow-up questions 10 minutes

Define the “true” follow-up question 10 minutes

The many forms of follow-up questions 20 minutes

Identify how to use different follow-up questions in different meetings  10 minutes

**Total:** **50 min**