*Presentation:*

Upping Your Question Game: 25 Questions for Better Client Connections Throughout The Financial Planning Engagement

*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:*

Asking great questions is an essential part of the job of the financial advisor. Great questions help us to gather important information, and great questions can help motivate clients to take action. Many advisors are aware of the difference between a closed-ended question and an open-ended question, but questions can take additional forms as well. Join us this month and learn not only about the different types of questions that are available to advisors, but also about how and when to use these questions throughout the financial planning relationship.

*Learning Objectives:*

* LO #1: Examine the impact of different styles of questions on the brain.
* LO #2: Review the varied types of questions advisors can use, more than just closed- versus open-ended questions.
* LO #3: Review ideas, and reasons behind those ideas, for asking certain types of questions at specific times related to the seven steps of financial planning.
* LO #4: Understand why continuing to ask great questions, beyond initial onboarding, is so important to keep the relationship with the client fresh.
* LO #5: Examine question-asking pitfalls and discuss how to avoid them.

*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

*Outline:*

* The psychology of questions – how questions impact communication 10 min
* Styles of questions: open, closed, projective, scaling, swing, and implied 10 min
* Review when and what questions to ask throughout the financial planning process 10 min
* Understand how to use questions to keep the relationship fresh 10 min
* Examine common question pitfalls 10 min

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