



You have 20-30 minutes. Use what you know about your client's assets and investment goals to determine if you have a unique opportunity to help them understand how to best protect their assets and plan for the future. If you do, you should be prepared to discuss the importance of your role and how you will help them.

PROMPT TO CO-CONVERSATION
Can we explore that aspiration/transition further?
Tell us more about (aspiration/transition)
That aspiration/transition can mean different things to different people, tell us what it means specifically for you? Have a best guess response is OK?

Slowly re-probe, ensuring there is enough **silence** for client's to best respond
4U

PROBES TO ADDRESS YOUR CLIENTS, BUT WOULD LIKE TO HEAR SPECIFICALLY FROM YOUR PARTNER?
"We do not want to make any assumptions as to what is important for you both individually and collectively"

Take as much time as you require as this is important to the client please probe.
"This can take a little time"
"This can't just about money, but also advice or planning."

PROBES TO ADDRESS YOUR CLIENTS, BUT WOULD LIKE TO HEAR SPECIFICALLY FROM YOUR PARTNER?
"We do not want to make any assumptions as to what is important for you both individually and collectively"

Reflect the importance of pressing issue or specific tactics discussed while parking this until an understanding of value is identified
4K

PROBES TO ADDRESS YOUR CLIENTS, BUT WOULD LIKE TO HEAR SPECIFICALLY FROM YOUR PARTNER?
"We do not want to make any assumptions as to what is important for you both individually and collectively"



IF YOU WANT TO TAKE CRUCIAL CONVERSATIONS TO THE NEXT LEVEL, JOIN OUR FREE WEBINAR

TRIGGER POINTS TO ASK: MUTUAL PURPOSE (Should "I could Contribute?")
STEP ONE: Agreeing to help our client understand (e.g. "to help, please to better explain/signify")
STEP TWO: Encouraging agreement
e.g. "I don't mean to ask irrelevant questions. I do want to understand everything we believe is important to you and your partner's goals."
STEP THREE: Reiterated Mutual Purpose
e.g. "The objective of the conversation is clearly understood the value you are bringing from us today"

EXAMPLES OF SIGNATURES MAY INCLUDE:
Specific hobby, destination, length of holiday, frequency of holidays - Specific amount of essential funds length, number of children, colleges, universities or courses for self, children, grandchildren, others - Specific intentions to home, education and future of our property, interest for specific investment others - Funding for new careers, other - Specific to real estate other than just of home own, partnership, family plan - Specific to further interest in specific location, collections, systems, specific - Specific to support children, causes, philanthropic interests - Specific to manage retirement, legacies...

REVIEWING DISCOVERY CONVERSATIONS when Discovery Conversations get to this stage they provide great opportunities for de-briefing, coaching and/or program. Inquire as to share recordings of these conversations to support progress.