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LEARN | Taxes Matter: 3 Questions to Ask

Every tax year can be different, and adjustments should be considered continually. Elevate the tax planning services you provide by first knowing which questions to ask clients and prospects.

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Key Takeaway

By having informed conversations about taxes with your clients and prospects, you are not only demonstrating your expertise, you are setting yourself apart from other financial advisors by asking the right questions.

3 Questions to Ask

Select a question to learn more about why it's important to raise the topic in your conversations.

Question

What detracts more from investment outcomes: fees or taxes?

Question

How much of an impact do taxes have on your investments each year?

Question

Are you open to looking for ways to reduce the amount you pay in taxes each year?

Next Step

How clients and prospects answer these questions can help you gauge their level of interest in tax-planning services.

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