Attracting Clients | Chasing Positivity

Three Questions for Year-End Conversations

By: David Richman | November 8, 2023

How can you use the weeks ahead to set the stage for meaningful planning conversations in the new year? Simply by asking intentional questions in your year-end calls with clients.

Rather than asking, "What are you doing for the holidays?" we propose asking one (or more) of the following three questions that unlock the door to more meaningful conversations:

"What are you most looking forward to this holiday season?"

This question is a great icebreaker that allows you to gain a little more insight and tap into a client's current state of mind.

"What are you most grateful for as you reflect on the past year?"

This question can help give you a sense of your client's priorities, while also positioning you as a resource who chases positivity. Perhaps your client will repeat this question when their family is gathered for the holidays—prompting discussions about causes near and dear, family mission statements, or perhaps a family giving philosophy. It could even result in an opportunity for you to be a navigational beacon in a follow-up meeting.

"To what degree are you open to bringing a fresh lens to your financial plans when you think ahead to 2024?"

This question should open a client's mind to engaging in a planning process with you. In most cases, your clients' attorneys and CPAs aren't reaching out with proactive planning ideas. Advisors are in a unique position to bring planning ideas to their clients' attention, and then involve the attorney or CPA to decide what might work best and to execute the plan.

Bottom Line: Ask clients open-ended questions centered around family and gratitude to spark intentional year-end conversations and fill your January with productive follow up meetings.

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