



PERSONAL BRANDING

“Asking your clients open-ended questions makes you seem more personable, as opposed to being someone who only provides information and advice. To build trust, always do more listening than talking in client meetings.”

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# Asking the right questions

Building trust with women investors requires you to be in tune with their needs: and women want to be heard. When you ask open-ended questions—and truly listen to the answers—there is an opportunity to learn valuable information that you might otherwise miss.



Be sure to view the companion video, “True Communication,” before completing this worksheet.

## Be inquisitive.

Open-ended questions are helpful, not only in establishing the priorities of women clients, but in discerning their degree of sophistication. Your clear willingness to listen will also help you gain their trust. But make sure your questions aren’t assumptive or condescending. Focus on the foundational goals of an investment strategy, and speak to those goals.

Complete the exercise below to see if you’re prepared to ask the right questions.



1. Your client is a middle-aged widow asking about retirement options for her portfolio. Which question should you ask to get started?
  - (A) Are you planning to retire at age 65?
  - (B) How long are you planning to work before you retire?
  - (C) Have you given any thought to how long you need to work in order to retire?



2. A young married couple is in your office inquiring about ways to diversify their portfolio. Which question(s) would best begin the discussion?
  - (A) What roles do each of you play in your family’s financial planning process?
  - (B) Are you first-time investors?
  - (C) What do you hope to achieve with a more diversified portfolio?



3. A recently retired client wants to learn about ways to generate income for retirement. Which questions would you ask her?
  - (A) What are your income goals for this investment?
  - (B) How important is it that you reach these goals?
  - (C) Does my explanation make sense?

