|  |  |
| --- | --- |
|  | ISBN questions |

Use this form to craft “Three E” questions to identify whether a prospective client has a need for the things you do best as a firm. Here’s an example:

ISBN

|  |  |
| --- | --- |
| **Issue** | I don’t know my number. |
| **Solution** | We’ll work with you to develop a “Wealth Plan,” which includes a cash flow analysis and financial snapshot (includes assets, risks, taxes, etc.). We’ll also meet with you on an ongoing basis to recalibrate the plan when things change (personal situation, the market, etc.). |
| **Benefit** | You’ll have a roadmap for saving, spending and investing your money for maximum return, and remove doubts about whether you’ll have the capital you need to live the lifestyle you envision for yourself and your family. |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** | What are your long-term goals, dreams and concerns? |
| **Elaborate** | What information/guidance do you need to make intelligent, informed financial decisions moving forward? |
| **Evaluate** | Do you have enough money to retire on? If not, how much do you need? |

ISBN #1

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #2

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #3

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #4

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #5

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #6

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #7

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #8

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #9

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |

ISBN #10

|  |  |
| --- | --- |
| **Issue** |  |
| **Solution** |  |
| **Benefit** |  |

ISBN questions to draw out need

|  |  |
| --- | --- |
| **Entry** |  |
| **Elaborate** |  |
| **Evaluate** |  |