27 POWERFUL QUESTIONS

Powerful questions advisors can ask to build better relationships

Category 1: Prospect Conversations – Build Trust, Go Deeper, Sooner

1. "What's on your mind about your money?

2. Fast forward 1 year. It's been the best year of your life - what happened? How about 5 years...?

3. What do you want?

4. What does a successful advisor relationship look like to you?

5. What's something you wish your previous advisor had asked you?

6. What's keeping you from feeling totally confident in your financial life right now?

7. If we're sitting here together next year, what has to happen to make choosing to work with us the best decision you've made all year?

Category 2 Clients Who Are Stuck – Reframe, Unblock, Inspire Action

8. "What's the smallest next step you could take?"

9. "What if you didn't wait to do _____?"

10. What's getting in the way? What are the obstacles you face?

11. "What would your kid tell you to do about this?"

12. "What are you assuming here that might not be true? What story are you making up?

13. "What's the cost of staying where you are?"

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14 "What would you advise a friend to do in this same situation?"

15 "What's the opportunity in this challenge?"

16 "What's one decision you've been avoiding?"

17 "What if it were easy?"

Clategory 3: Cients Ready to Dream Bigger – Invite Expansion and Possibility Fulfillment

18 "If we could wipe the slate clean, what would you do?"

19 "What would feel like a bold move?"

20 "Where do you limit yourself?"

21 "Where in your life are you playing small? Where do you want to go bigger?"

22 "What do you regret not doing?"

23 "What are you tolerating?"

24 "What are you failing to make space for right now?"

25 "What's one change that would feel incredibly freeing?"

26 "What would your future self want you to know?"

27 "What ELSE can you do to honor your values?"

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