

The Sales Process: Step 3

Practice Worksheet

Know Your Client

How would you ask to verify your client's identity?

Goals and Dreams

How would you ask about your prospect's priorities?

Income and Expenses

How would you transition to income and expenses?

Debt

What would you say to gather information about debt?

The Sales Process: Step 3 Worksheet Continued

Emergency Fund

How would you ask your prospect about their existing savings?

Retirement

How would you ask your prospect about their existing retirement plan (if needed)?

Estate Planning

What would you say to learn more about your prospect's plan for succession?
