



Even though labeled 90-Day Call Questions, these questions are a great guideline for core discovery questions every time you engage with your client. Be prepared with the client's account information and any comments you might have about the economy and the markets in case you need them when you engage with the client, too!

90-Day Call Questions

You don't need to ask each question at each call. This is a reference list to help you form a meaningful relationship and to make it easier for you start the conversations you have with your client!!

1. How have things been going?
2. Do you have any questions about your accounts or performance?
3. Ask or address as appropriate:
 - a. Beneficiary updates
 - b. Any important client information updates
 - c. Account rebalancing concerns or issues (i.e. cash balance needs versus the models)
4. Are you able to login to your portal and Schwab Alliance account to get the information you need?
5. Are there any major changes in your life that have happened or will be happening in the future?
6. What can I do for you as your advisor?
7. What is one thing we can do to better serve you and help you achieve your goals?
8. What are you getting out of this relationship and partnership?

9. IF and only IF the client has had a great experience as your client and your relationship has evolved to a point you are comfortable in asking, ask your client if they know of someone who they think would benefit from the same sort of relationship you and your client are enjoying, and if the client would help introduce them to you?

Now, and after every client engagement, DOCUMENT AND UPDATE the information in the Redtail CRM system, to include reminder tasks for future engagements, celebrations and communications!