

Core of the Financial Review



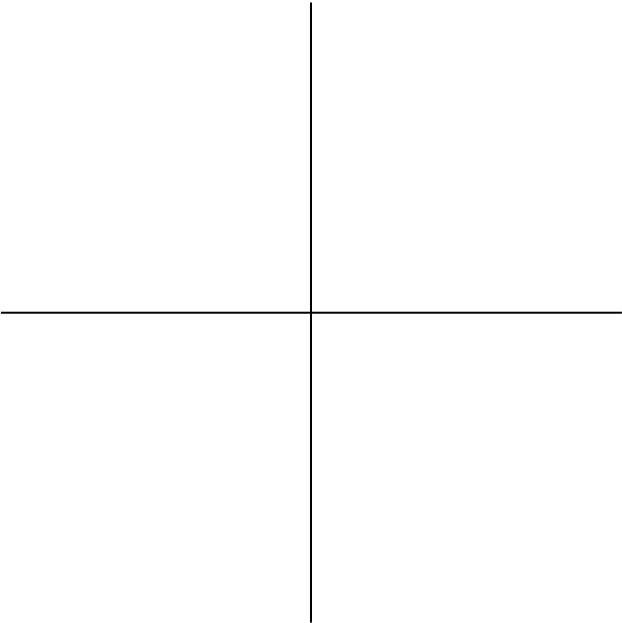
Categories of the Financial Review

- 1. _____
- 2. _____
- 3. _____
- 4. _____

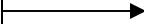
Big Five Financial Benefits

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

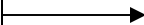
Quadrant Note Taking

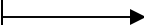


Objections Can Be Categorized As:



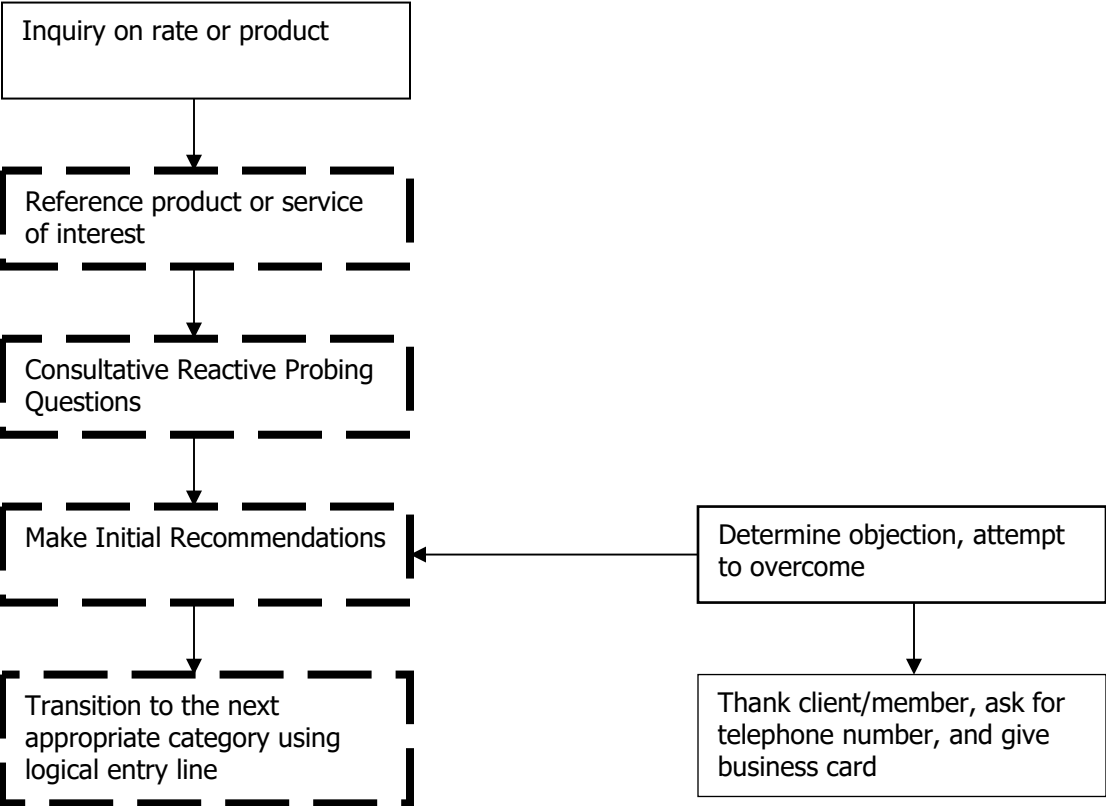








Consultative Reactive Selling Probes and Recommendations



Scenario 1

A prospect, age 55, comes in to open a checking account with \$12,000

1. Reference the product of interest

2. Transition to Consultative Reactive Probing Questions

3. Consultative Reactive Probing Questions

a.

b.

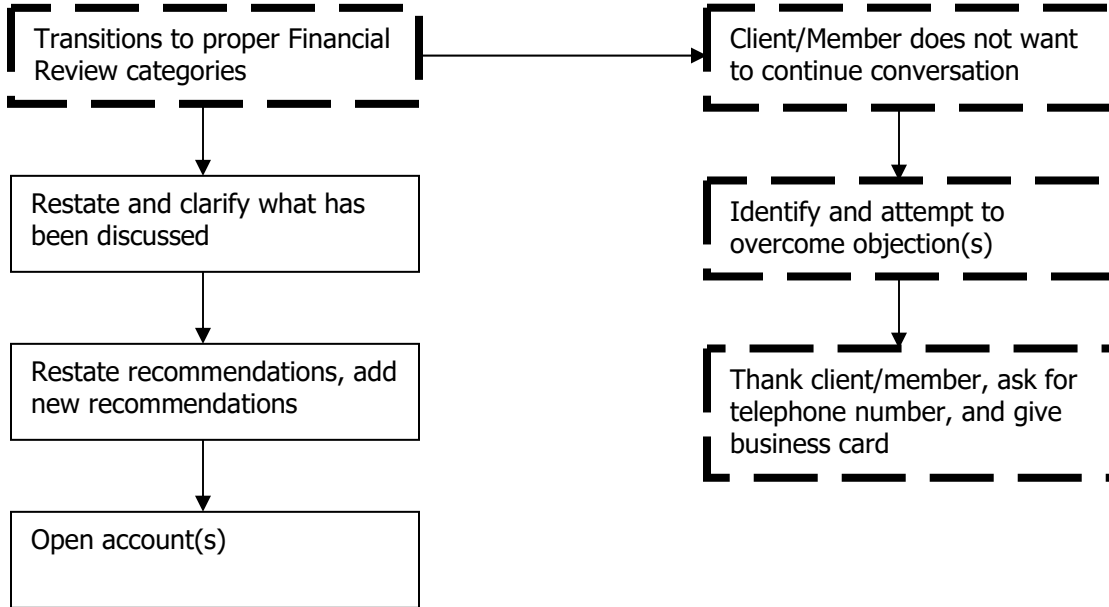
c.

4. Initial Recommendations

5. Financial Review Entry Line (contains justification, benefit to member/client, and length of time)



Steps of the Financial Review



1. Transition Line (and next probing questions)

- a. From the role-play, you learned the prospect has both their auto and home loan automatically deducted from their checking account. Create a logical transition into the next category, and develop probing questions.

Transition Line: _____

Probing Questions: _____



2. Transition Line (and next probing questions)

- a. From the role-play, you have learned the client/member has various retirement funds with a nationally known financial advising firm.

Transition Lines: _____

Probing Questions: _____

