

Core of the Financial Review

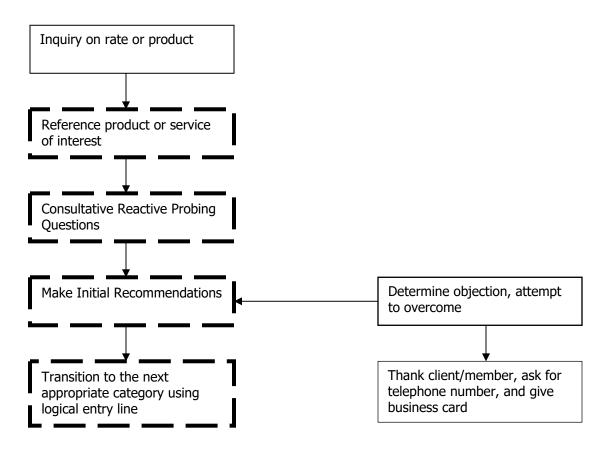


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1	
2	
3	
4	
Big Five Financial Benefits	
1	
2	
3	
4	
5	
Quadrant Note Taking	

Objections Can Be Cate	gorized As:	
	——	

Consultative Reactive Selling Probes and Recommendations

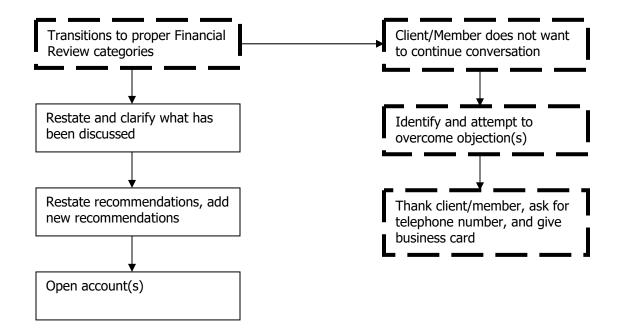


Scenario 1

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

Transitio	n to Consultative Re	active Probin	g Questions	
Consulta	ive Reactive Probin	g Questions		
a				
b				
C				
Initial Re	commendations			
Financial	Review Entry Line (h of time)	contains just	ification, benefi	t to member/cl
	n or unie <i>)</i>			

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)

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: