## BONUS: REPLICATE YOUR IDEAL CLIENTS

## Client Replication Interview Guide

### Your initial questions will frame your relationship and provide a big-picture orientation.

* What lifetime financial goals are most important to you?
* What have been your greatest personal financial frustrations?
* What else could I do to help you solve your problems or achieve your goals?
* What are the major financial challenges that people in your situation (company, industry, etc.) face today that I could help you solve?

### Your next questions will help you identify outlets in your niche that you can leverage.

* + Which business organizations do you belong to?
  + Which social organizations?
  + What sports or activities do you enjoy?
  + Any specific trade journals that you or your peers read?

### The next questions deal with clarifying your compelling value promise.

* + What is important to you in your relationship with a financial advisor?
  + What are the major benefits you have enjoyed by working with me?
  + If they asked, what would you tell your friends about me?
  + If you were me, how would you reach out to people like you?
  + What is the most compelling thing I could say to someone in your situation that would interest him or her in working with me?

### The following questions will help you understand the effectiveness of your positioning.

* + How did you first hear about me?
  + What initial expectations or impressions did you have?
  + What originally prompted you to work with me?
  + Whom else did you consider working with?
  + How would you compare me to my competitors?

### Your next two questions will draw out introductions for ideal prospective clients.

* + Do you know anyone like you who you think might benefit from receiving a second opinion on their finances from me?
  + Do you know anyone like you who you think might benefit from attending one of our exclusive, invitation-only private events? (if appropriate)

### The last, open-ended question will catch anything you may have missed.

* + If you were me, knowing what you know now, what else should I have asked you?