

HOT BUTTON OVERVIEW WORKSHEET

In every situation, your potential client has a choice to either engage with you or engage with a competitor. This can often lead to them getting poor advice or working with a financial planner that is nowhere near as good a match for them as you are... So we need to help them by 'pre-positioning' the Buying Criteria. First list out all the benefits of working with a financial planner, then install the possible objections your prospect could have, then list all the reasons they should choose you.

HINT: The reasons should be because you can deliver on all of column1 and overcome all of column 2.



The BENEFITS of financial planning	The OBJECTIONS to financial planning	Financial planner selection (why choose you)