



Fact Finding

# SYSTEM FOR FACT FINDING

**1** Prior to entering the meeting, leave 100% of your needs at the door and fully dedicate the meeting to their needs.

**2** Begin with a consistent approach language that effectively explains what you do, how you do it, and clearly delivers the benefit of working with you.

- During your approach, always point to physical examples as you talk about them i.e. – the fact finder, the checklist, a copy of the plan.

**3** Begin every fact finder with the goal in mind, that as you leave you want the prospect to feel three things about you:

- The financial rep really understands me
- The financial rep really cares about me
- The financial rep really knows what they are doing



**4** Master the question-to-question technique in order to fully understand the prospect's income, assets and liabilities - and the stories behind those numbers.

**5** Have a method of questions designed to uncover the gap between where they are and where they want to be in the three critical areas: survivor income, college education, and retirement.

**6** Master the process of effectively helping the client truly understand their gap in the event of a long-term disability.

**7** Have a process in place to compile all outstanding information necessary, during the meeting and at the conclusion of the meeting.

**8** Have a consistent way to communicate your discovery agreement that effectively does three things:

- Appropriately summarizes the entire meeting in a way that the client completely understands it,
- Effectively sets the expectation for exactly what needs to transpire in the next meeting, and
- Builds a compelling desire to get back together.

**9** If the fact finder opened one or more cases, always schedule the following meeting prior to departing.