

8 Points Every Client Profile Should Include

(Note: Be sure to jot down these important points on a real yellow pad when profiling)

1. **Get all the basics down** (you know: DOB, full name, address, phone).
2. **Ask the MOST important question:** "What are you trying to accomplish?" (Do not ask yes/no questions; open-ended questions inspire conversation and instill trust).
3. **Say: "Tell me about your family"** (instead of asking: "Are you married? Do you have kids?" let them discuss hobbies, occupation, recreation -- this instills trust and creates the potential for future referrals).
4. **Listen, Listen, Listen!!!** (active listening can be felt by the client - at the end of the day they are buying you, not a product).