



## Wealth Planning Strategies

### Insightful Questions That Can Ramp Up Your Success

**W**ant to see some amazing results in your life? Ask questions and then listen well. We have discovered that a disproportionate number of the most successful people consistently and systematically use an approach known as *insightful questioning* to build rapport with other people in ways that generate much better outcomes.

Here's how they engage in insightful questioning—and use it to generate truly impressive success.

#### The importance of insightful questioning

Being adept at using carefully chosen insightful questions serves a number of purposes:

- It enables you to be more effective at garnering useful and important information from other people—such as their goals and the drivers behind those goals. Armed with that information, you can potentially find ways to work together that might not have been obvious otherwise.
- It facilitates rapport between you and other people because it seeks to create deeper levels of understanding of all those involved.
- It's a powerful way to connect with other people and provide you with information that you can use to further your own agenda—often while simultaneously helping them, too.

#### Be an engaged listener, too

Asking insightful and thought-provoking questions ultimately won't help you learn new information or build rapport if you tune out when the other person answers. You must also be adept at *deep listening*—focusing intently on the person talking through fully present, nonjudgmental listening.

When you deeply listen to someone, it's almost as though you are suddenly standing next to the person and seeing the world as he or she sees it. You become a comrade or partner. Since most people rarely have the experience of being deeply listened to, this experience of camaraderie is equally rare. The person you're interacting with will feel more bonded to you as a result.

How do you do it? Start by saying to yourself, "I am going to have a great conversation with this person, and we will both have a great experience." With so many thoughts buzzing around in your head all day, you must intentionally commit to being as present as possible with the person in front of you. By keeping this intention foremost in your mind, you will greatly increase your odds of success.

Then listen on the surface to the information that the person provides. It's important that you capture this surface information as accurately as possible. But also listen for the person's thoughts, feelings, values and needs—which he or she might not come right out and say directly.

#### THE TOP INSIGHTFUL QUESTIONS TO ASK

Consider the following insightful questions that many successful people tell us they regularly use in their conversations and dealings with others who are (or may be) important to them.

##### *What do you think?*

People are very willing to share their opinions and insights if prompted. They want to be recognized for their views and ensure you understand their positions on important matters. Any time you need to act, it's usually very useful to know where the other person stands.

Gathering intelligence and gaining perspective into the thinking and preferences of the people you are dealing

with is always beneficial. Furthermore, this question helps you foster involvement in the process at hand—thereby building rapport and ensuring closure.

### **What do you want to accomplish?**

Knowing what a person really wants to accomplish informs you of the degree of overlap—or conflict—among both of your agendas. It also helps you frame your desires in ways that best resonate with the other person. This can result in a greater willingness to work with you.

### **What's the most important thing we should be discussing today?**

It's normal for people to go into any meeting with an agenda. However, your objectives for the meeting may not coincide with that of the other person, which can lead to wasted time and effort adversely impacting the relationship. Use this question at the start of a meeting or it's going off track.

To be truly responsive requires you to be in synch with what is important to the other person at that time. This question demonstrates that concern and is very useful in addressing critical needs and wants.

### **Can you tell me more?**

It's common for someone to put forth a position that might not be clear. Many people make presumptions that may be inaccurate and detrimental to the relationship.

The better you understand the other party's thinking, the better your rapport with that person.

### **How can I be of greatest help to you?**

Most of the time, people are seeking ways they can benefit themselves. This question determines how you can be supportive of and deliver value to the other person. Ask it whenever there's an impasse in a discussion, or when they are dealing with some difficulties.

From basic caring and concern to helping facilitate success to building meaningful rapport, your willingness to help the other person can pay enormous dividends. Whether or not you are ultimately able to assist someone, your determination to try to address the matter is a powerful bridge builder. What's more, when you voluntarily help someone, that person usually feels a natural inclination to want to return the favor and help you down the line.

This report is an executive summary of our e-book.  
For a complete complimentary report, call or email.



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Paul and his firm act as a personal chief financial officer for clients, bringing together a distinctive multi-disciplinary wealth management process with specialists that integrate retirement planning with investment management, mitigating taxes, protecting assets, and passing on a legacy for family, community and causes to make a greater impact.

In 1983, Paul earned a pioneering designation as a Certified Financial Planner (CFP®), and then ChFC® (Chartered Financial Consultant) and ATA (Accredited Tax Advisor). He earned his MBA in Finance from the Simon Business School at the University of Rochester. His extensive education includes MFP (Master of Science in Financial Planning) and MSFS (Master of Science in Financial Services). Paul has been presented with the Albert Nelson Marquis Lifetime Achievement Award by Who's Who.

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