MassMutual Ascend

Strengthening client relationships

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Every interaction with a client shapes their overall experience with your practice. Going beyond investment performance to provide reassurance, personal attention and clear communication helps build lasting trust.

Onboarding

As the saying goes, you only get one first impression. Onboarding sets the stage for your professional relationship. **Consider using the following prompts when onboarding new clients to dig deeper into their needs and expectations.**

1. What made you seek the assistance of a financial professional?
2. What has your relationship with money looked like throughout your life?
3. What is your biggest financial stressor?
4. Does anyone rely on you financially?
5. How does your family and cultural background impact your attitudes towards money?
6. What do you consider financial success, outside of a dollar amount?
7. What kind of lifestyle do you want in retirement?
8. What other professionals do you work with (ex. insurance, attorney, real estate agent, etc.)?
9. How have you managed money in the past? What aspects would you like to continue?
10. What are the most important items for us to address in your financial plan?

Collaborating

More than ever before, today's clients want to be an active participant at every step of their financial planning. Actively collaborating with clients at different stages of their financial journey is an important way to ensure your clients are not only satisfied with the services you provide but understand the value they offer.

Consider using the following prompts to facilitate client collaboration throughout your professional relationship.

1. Do you have any questions for me, based on your financial plan performance, current financial events, or what we discussed in our last meeting?
2. How often are you reviewing your financial plan/performance?
3. What financial issues are top of mind for you?
4. Have your long-term financial goals shifted since we last met?
5. Have you had any major life-changes since we last spoke? Are there any on the horizon? (ex. raise, medical diagnosis, etc.)
6. How confident do you feel about your financial plan?
7. Is there anything you think we should have done differently?
8. Are you satisfied with our frequency of communication?
9. Am I meeting your expectations?
10. Do you understand how the current economic climate could impact your financial plan/goals?

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