



# CHRIS JARVIS

*See Differently. Business Differently.*

## 20 Questions to send to Clients

**The key to success in insurance is to solve the client's most pressing concerns.**

The shortest path to identifying their biggest problem is to ask great questions.

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## 20 Questions that Will Help Me to Help You

#	Question	YES	NO
1	Are you and your spouse/partner salaried employees?		
2	Do you or your spouse own your own business/practice?		
3	Do you receive investment income from investments or rental income from any real estate that you own?		
4	Do you believe you are paying a fair amount of income tax?		
5	Does your CPA give you new tax-saving ideas every year?		
6	Have you had another accountant or tax attorney give you a second opinion on your tax planning in the last 2 years?		
7	Do you have a charity or educational institution you would like to help — if it were tax efficient for you?		
8	Do you have an investment advisor you like and trust?		
9	Are you concerned that the stock market may drop soon?		
10	Are you afraid of being sued by tenants, clients, partners, or because of actions of your spouse, partner or children?		
11	Do you own assets in your own name, in a living trust, jointly with a spouse (or anyone else), or in a partnership?		
12	Are you or your spouse/partner in a high risk profession (e.g., medicine, real estate, architecture, construction, etc.)?		
13	Do you have an umbrella liability policy for \$2M or more?		
14	Would it bother you if you left an inheritance to your children or grandchildren and half of it were lost to divorce?		
15	Does your family have life insurance?		
16	Do you have enough monthly disability income insurance to replace your income and cover all of your expenses?		
17	Do you parents and in-laws have enough saved to pay for the \$300/day cost of a nursing home?		
18	Are you sure that you are on track saving for retirement?		
19	Would you be interested in guaranteed retirement income or principal protected investments for your retirement funds?		
20	Will you be financially responsible for your parents, in-laws, any siblings, or special needs children now or in retirement?		
21	Is there something bothering you that I failed to ask?		

Please return to \_\_\_\_\_