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Asking Trilogy Questions to Uncover Emotional and Economic Concerns

Asking well-thought-out and probing questions is a great way to help establish a long-term relationship with your clients and their family. Digging deep and personalizing your conversations can become second nature and keep your clients happy with you as their financial professional.

Knowing the right questions to ask is a skill that can put clients at ease and provide you with the information to help them reach their goals.

The Trilogy Question Worksheet can help you to ask more in-depth questions. Click Here to download the Lincoln Financial Group worksheet.

We are happy to help or answer your questions.
Contact Jeff, Eleanor, of Frank for more information.

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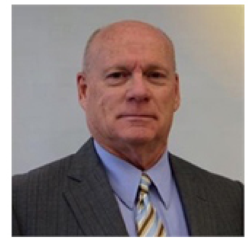

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