

THE LINKEDIN COURSE FOR FINANCIAL ADVISORS

Worksheet: Identifying Your Qualified Prospects

Complete this worksheet with your ideal client in mind. To illustrate your ideal client, think of your top five existing clients. These should be the clients that you enjoy working with, look forward to meeting, and realize a solid profit from. Write their first names here:

1. _____
2. _____
3. _____
4. _____
5. _____

How old are they?

Where do they live? Include zip code.

At which company do they work?

What is their job title?

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What is their income level?

Where did they work previously?

Where did they go to college?

What do they do for fun? Which causes are they passionate about?

Where do they get their news?

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What is their biggest financial goal?
