



MONEY IN MOTION

Sample Probing Questions for Referrals

1. Who is the next person in your company to retire?
2. Who was the last person in your company to retire?
3. Who is the next person in your circle of family and friends to retire?
4. Who was the last person in your circle of family and friends to retire?
5. Among your business associations, who is the last person to have sold a business?
6. Who is the last person you know to have sold a business?
7. Who in your circle of family and friends is the person who most recently received a promotion?
8. Who was the last person you know who changed jobs or moved to another company?
9. In your circle of family and friends, who is the last person who left a company because of downsizing?
10. Who is the last person who received a substantial legal settlement?
11. Who is the last person to have lost a spouse?
12. Who is the last person to have received an inheritance?
13. Who is the last person to have lost a parent?
14. Who is the last person to have received a large tax refund?
15. In your circle of family or friends, who is presently worrying about their CD's?
16. In your circle of family and friends, who is the one person who is the most dissatisfied with the performance of their investments?