

# THE CLIENT CONNECTION LIST

ESSENTIAL  
QUESTIONS TO  
ASK YOUR CLIENT

*Connecting with your clients on a personal level is key. But don't leave it to chance — here is a list of information you can begin to collect over time.*

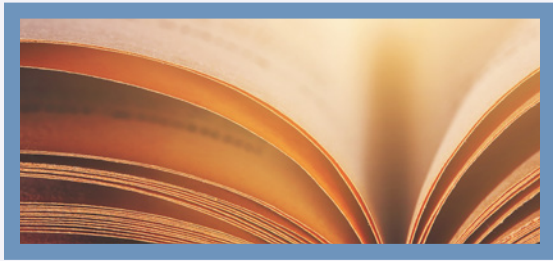


## PERSONAL & FAMILY

- 1 Birthday
- 2 Spouse's Birthday
- 3 Wedding Anniversary
- 4 Belief/Faith
- 5 Marital Status
- 6 Hometown
- 7 Previous Places Lived
- 8 Children's Names/Ages
- 9 Children's Schools
- 10 Children's Interests
- 11 Children's Activities/Sports
- 12 Children's Achievements
- 13 Pets: Types & Names
- 14 Most Recent Vacation
- 15 Next Vacation
- 16 Club Memberships
- 17 Organizations

## BUSINESS & CAREER

- 18 Occupation
- 19 Industry
- 20 Employer Name
- 21 Significant Challenges
- 22 Largest Competitor
- 23 How They Got Started in Business/Career
- 24 Previous Places of Work
- 25 College/University/Schools Attended
- 26 Recent Seminars Attended
- 27 Trade Associations
- 28 Trade Publications
- 29 Awards in Office



## INTERESTS & FAVORITES

- |    |                          |
|----|--------------------------|
| 30 | Hobbies                  |
| 31 | Leisure Activities       |
| 32 | Participant Sports       |
| 33 | Classes Taken            |
| 34 | Recent Books Read        |
| 35 | Foods They Love          |
| 36 | Restaurants They Enjoy   |
| 37 | Movies/Shows they love   |
| 38 | Magazine/Periodical      |
| 39 | Sports Team              |
| 40 | Type of Cars They Like   |
| 41 | Personal Goals           |
| 42 | Awards Won               |
| 43 | Views on Topical Matters |
| 44 | Type of Car Owned        |
| 45 | Dislikes                 |

