

5 ESSENTIAL RESPONSES TO COMMON SMALL TALK QUESTIONS



Turning small talk into Opportunity

It's holiday time. Now, and throughout the year, you're going to be in small talk situations. Whether you're meeting new people who want to know what you do for a living, or interacting with common acquaintances who want your take on the markets, you'll be faced with the same small talk questions you've been fielding for years.

Want to turn this into opportunity?
Continue reading.



1 What do you do for a living?

I oversee the financial well-being for a select group of {fill in the blank depending on whom you're talking to} in the area.

DO NOT try to sell. They're not ready.

But, be ready for the follow up question, "how do you do that?" or "what does that mean?" Use an analogy they can understand, like I am the family CFO, or financial quarterback.



2 What do you think about the markets?

I don't spend a lot of time thinking about the markets, we can't control them and we can't predict them. And, they impact each of my clients differently.

As markets change, we do a bit of rebalancing for our clients. Is that something your advisor has done for you recently?



3 How's Business?

Respond in a friendly and professional manner that conveys their enthusiasm and competence.

"Business has been quite good lately. I've been working closely with my clients to help them stay focused on their goals and navigate the ever-changing market conditions. It's been a busy but rewarding time. I always have room to help you if you need."



4 What do you think of this stock?

I'd never recommend you focus on one stock. For most people this creates too much risk. Tell me, what are some of your goals? We can get you there without trying to get lucky with a single stock. I'd be happy to show you how.



5 What's the economy going to do in 2024?

That's a great question. Staying informed is important, but no one can predict the future.

Our focus lies squarely on protecting our clients against risk and setting them up for growth and success. Who's looking out for your family's well-being? You know where I am if you need a second opinion.



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