

Client Profile

Goals and Values

Goals:

Values:

Age:

Gender:

Marital Status:

#/Age of Children:

Location:



Challenges & Pain Points

Challenges:

Pain Points:

Sources of Information

Books:

Magazines:

Blogs/Websites:

Conferences:

Gurus:

Other:

Quote:

Occupation:

Job Title:

Annual Income:

Level of Education:

Other:

Objections & Role in Process

Objections to the sale:

Role in the Decision Making Process: