

The Client Connection List

INDIVIDUAL	1	Favorite hobbies – What are they passionate about?
	2	Favorite magazine/periodical
	3	Favorite movie
	4	Leisure activities – weekend, vacation, etc.
	5	Favorite sports team
	6	Favorite participant sport
	7	Type of car owned/most liked – might be different
	8	Pet owner?
	9	Most recent book read
	10	Favorite place to eat
	11	Favorite food
	12	Status symbols in office – take note of and talk about awards, trophies, etc.
	13	Most recent seminar attended
	14	Most recent vacation – Where? Where will the next vacation be?
	15	Taking classes – personal development, etc.
PERSONAL	16	Hometown
	17	Birthday
	18	Current residence
	19	Marital status and name of partner
	20	Personal goals
	21	Awards won
	22	Dislikes
	23	Views on topical matters
	24	How did they get started in business?
	25	How did they get started in their career?
	26	College/university/other school(s) attended
	27	Member of a country club?
	28	Previous places lived in
	29	Previous places worked in
	30	Belief or faith
FAMILY	31	How many children? Who is in school? Studying what?
	32	Their activities/sports
	33	Their achievements
BUSINESS	34	Most significant challenges
	35	Largest competitor
	36	Involved in which trade associations
	37	Subscribe to/read what trade publications
	38	Involved in what civic/community organizations
	39	Past experiences they've had dealing with your type of service

