

PROFILER

# FINANCIAL SERVICES

ICP QUESTION  
GUIDE

## DEMOGRAPHICS AND PERSONAL DATA

- What's your age group?
- What's your highest education level?
- What do you do for work?
- What's your gender?
- Are you married?
- Do you have children? What age groups are they in?
- What is your current financial status?
- Who in your family handles the finances?

## MAJOR INFLUENCERS AND ONLINE BEHAVIOR

- Which social media platforms do you use every day?
- Which social media platforms do you use on a weekly basis?
- Where do you go for information to solve financial problems?
- How do you stay up-to-date with tax information?
- Where do you search for service providers?

## HOPES AND GOALS

- What financial goals does your family have?

- Do you have any large upcoming expenses?
- How does using [your financial services] help your family reach their goals?

## PAIN POINTS

- How many times have you come across a financial issue you couldn't solve on your own in the last year?
- What's your family's biggest challenge when it comes to finances?
- Do you complete your tax returns alone, or do you use our services?
- Before working with us, what was your family's biggest financial challenge?
- Did you have a deadline to overcome that challenge?
- How has [company] helped you overcome that challenge?

## PRICE SENSITIVITY

- How much budget does your family have for financial services?
- At what price would you consider financial services to be so expensive that you would not consider buying them?
- At what price would you consider financial services to be so cheap that you doubt the quality?
- At what price would you consider financial services to be somewhat expensive, but still an option?
- At what price would you consider financial services to be a great deal?

## DECISION FACTORS AND PURCHASE PROCESS

- Where did you first hear about us?
- Why did you decide to work with us?
- Did you use another financial service provider before working with us? If so, why did you switch?
- How did you decide what financial services you needed?

## COMMON OBJECTIONS

- What main concerns did you have about purchasing financial services?
- Which services do we not provide that you would use?

## USE OF YOUR SERVICES

- How often do you need our financial services?
- Did the service provided live up to your expectations?
- How do our financial services help your family?
- How do our financial services benefit you as an individual?