

Building and maintaining a relationship with your banker

As a business owner, your Relationship Manager is one of the most valuable people to have on your team of trusted advisors. Open communication and a collaborative approach are key to ensuring you get the best advice to help build, and continue to grow, your business.

With that in mind, take a few minutes to answer these questions before your next meeting. The more your banker knows about you and your business, the better he or she will be able to assist you.

1. What are some of the top challenges you face in your business?

2. What specific questions would you like to ask your banker at this time?

3. What do you hope to get out of your next meeting?

4. What are your goals for business growth?

5. When was the last time you updated your business plan?

6. What are some of the potential gaps in your plan, and how are you planning to address them?

7. What advice or assistance are you hoping your banker can provide to help you move forward with your business goals?

Track and celebrate the milestones in your business journey!



Hold onto this worksheet and revisit it as you progress. Looking back on how far you've come can provide great inspiration as you continue to move forward!

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