**12 Topics Financial Advisors Can Ask Their Clients**

**1. Money and the meaning of money**  
What are your money fears?  
What do you feel is most important to teach your children or grandchildren about money?  
What do you want to achieve with your money?  
What is financial freedom?   
What does a rich life look like?

**2. Goals and dream**sWhat is most important for you to accomplish in your life?   
What do you want for your spouse, your children, your grandchildren, your parents, community, and world?   
What are your most important goals?  
 If money was no object and you could do anything you wanted to what would you do? Whatever the answer what is it about that you really want to do?   
What is on your bucket list?

**3. Values**  
What values do you hold most dear?   
If you had a year to live what would matter most? Tell me more about that. What would that look like?   
What gives meaning to your life?   
What accomplishments has been most rewarding for you?   
What is it about that is most rewarding?   
Where have you had the most influence?   
Who inspires you?   
What is it about them that inspire you?

**4. Interests and passions**What gives you joy?   
What is your secret passion?   
If you wanted to teach something what would it be?   
What activities do you find most fulfilling?   
What would your ideal day look like?   
What are your favorites books and movies?   
What is it about those books that are meaningful to you?

**5. Their relationships**What relationships are most important to you?   
What are your family issues, concerns, and fears?   
If you can give one thing to your children what would it be?

**6. Health**  
How is your health, your families health, any health concerns?   
What do you feel has helped you to have good health?   
If health is a problem do you feel you are getting the best possible care?

**7. Business or career**  
Tell me about your business, when did you get started?   
What do you enjoy the most about your work?   
What are your career goals?   
What is your biggest challenge?   
What do you see as the trend in your business?   
What is the next step for you in your career?

**8. Retirement (what’s next)**  
What would the perfect retirement look like?   
What would you most like to do in the next stage of your life?   
What have you always wanted to do you haven’t done yet?

**9. Legacy**   
How do you want to be remembered?   
What is the legacy of your values?   
What do you want your financial legacy to be?   
What would you like your legacy be for your family, city, and the world?

**10. Philanthropy**  
Do you volunteer?   
What are your favorite causes or charities?   
Of all the gifts of time and money you have given over the years, which was the most meaningful to you?   
What would you like to have happen as a result of your giving?   
What core value would you like your giving to reflect?   
Who has made a difference in your life?   
Would you like to help others in a way you have been helped?

**11. Peace of Mind Conversations**   
Is everything taken care of if something were to happen to you?   
What do you need to feel safe and secure?   
What keeps you awake at night?   
What are your fears, concerns, worries?   
What do you need to do to protect all that is near and dear to you?

**12. Life issues**  
Clients will need some support and an empathetic listener. These are all the normal things that happen in our lives, births, death, marriages, divorces, selling a business, job loss, retirement, moving, children leaving, health issues. We ask: how are you doing?   
How is this affecting you? What life changes are you experiencing? What is this like for you? What kind of support would be helpful?