**ADVICE MAP QUESTIONS**

**(i.e. Questions for Initial & Major Progress/Discovery Meetings with Advice Clients)**

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| GOALS QUESTIONS |
| 1. What goals are important for you? Approximately how much money will be required for each goal? By when (i.e. exact date) do you hope to achieve each goal?\* |
| 1. What have been your proudest achievements? |
| 1. Describe your desired lifestyle when you are 45? 55? 65? 75? 85? |
| 1. When you think about your money, what concerns, needs or feelings come to mind?\* |
| 1. Presume you don’t have to work at all. What would you do with your time? |
| RELATIONSHIPS QUESTIONS |
| 1. What do you do (or want to do) for your children?\* |
| 1. What do you do (or want to do) for your parents?\* |
| 1. What do you do (or want to do) for your extended family, friends or community? |
| 1. Which family relationships are the most important ones for you?\* |
| 1. What is your religious orientation? How important is religion or worship in your life?\* |
| 1. How important are your relationships with people you work with? |
| 1. How important are your relationships with people in your community? |
| 1. What pets do you have? How important are they to you or to those that live with you?\* |
| 1. What schools / universities / colleges did you go to? How important is your relationship with these institutions? Do you hope to fund your children / their children / others through similar institutions? |
| 1. Do you have any previous relationships that need to be considered for the purposes of organising your estate planning affairs?\* |

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| **INTERESTS QUESTIONS** |
| 1. What are your hobbies? |
| 1. What charitable causes do you donate to? Volunteer for? |
| 1. What do you like reading? |
| 1. Do you have any health concerns? |
| 1. How important is fitness to you? Do you have a fitness program/regime? |
| 1. What would an ideal weekend be?\* |
| 1. What would an ideal holiday be?\* |
| 1. Do you follow any sport? What are your favourite teams? |
| 1. What are your favourite types of TV programs and movies? |
| **ADVISERS** |
| 1. Who is your accountant? What’s the best aspect of the relationship with your accountant?\* |
| 1. Who is your lawyer? What’s the best aspect of the relationship with your lawyer?\* |
| 1. Do you have a financial planner? What’s the best aspect of this relationship?\* |
| 1. What have been your best and worst experiences with your professional advisers? |
| 1. Of late, have you switched any professional advisers? Why did you switch?\* |

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| **PROCESS** |
| 1. How involved do you want to be in the on-going management of your financial situation?\* |
| 1. What have been your best & worst financial decisions? Based upon these experiences, what process should we put in place as we work together? 2. How and when are you best contacted by our team? Online meetings (GoToMeeting, Skype, Zoom, Viber), Phone, Text, Email, work time, non-work time?\* 3. How many face-to-face meetings do you want annually? |
| 1. How do you recommend we make contact for matters of higher importance?\* |
| 1. How often do you seek a comprehensive progress review of our work together? 2. Who else do you want involved in the decision making, management or just awareness of the work we do together?\* 3. How do you recommend we introduce ourselves and maintain necessary communication links with your existing professional advisers?\* |
| **FINANCIALS** |
| 1. How do you make money today? What is the source of your income? How is this likely to change in the next three years?\* |
| 1. How do you save or set aside money? Approximately how much cash do you spend per month? How is this likely to change in the next three years?\* |
| 1. What is your strategy for handling your investments the way you do and how do you benchmark your performance? Are you on track to achieve your financial goals? |
| 1. What financial benefits do you get from your workplace? |
| 1. How are your assets structured now (i.e. personally, company or trust)?\* |
| 1. What property do you have (e.g. real property, art, collections, jewellery)? |
| 1. What new assets do you expect to receive (for example, from inheritances or share options)? |
| 1. What is your opinion of taxes? |
| 1. When you think about your finances, what are your biggest concerns?\* |
| 1. What insurances do you have?\* |
| 1. What were your best and worst financial decisions? What happened? |