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SOCIAL  ADVISORS

QUESTIONS

that warm up cold connections


For Financial Professionals

Gain insight into your cold connections and warm them up for more meaningful business conversations.

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- 1 What kind of financial legacy would you like to leave for your loved ones or future generations?
- 2 How do you envision your financial decisions impacting your family's future?
- 3 What are your fundamental beliefs about money and wealth?
- 4 How did your upbringing shape your financial beliefs?
- 5 How do you balance enjoying life in the present while also planning for the future financially?
- 6 Can you share a personal story about overcoming a significant financial challenge in your life?
- 7 How has adversity influenced your approach to managing finances?
- 8 What does your ideal retirement look like? How do you envision spending your time and resources during retirement?
- 9 Are there any specific financial concerns or fears related to retirement?
- 10 Have you considered investing in projects or companies that align with your values and have a positive impact on society or the environment?

- 11** How important is it to you to invest in businesses with strong ethical and sustainable practices?
- 12** What does financial independence mean to you? How do you plan to achieve it?
- 13** How would achieving financial independence change your life or the way you approach work and personal
- 14** How do you view the relationship between money and happiness?
- 15** Have you made any financial decisions that significantly improved your overall well-being?
- 16** How do you evaluate the balance between taking risks for potential financial growth and preserving your wealth?
- 17** Are there any charitable causes or organizations you're passionate about supporting financially? Why do these causes matter to you?
- 18** How do you incorporate charitable giving into your overall financial plan?
- 19** Where do you see yourself financially in 10, 20, or 30 years? What steps are you taking to work towards that vision?
- 20** What motivates you to make financial decisions that align with your long-term goals?