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### Wisdom Questions

- **If we worked together over the next year and co-created the perfect financial plan for you, all the way through to retirement, what three things would we have accomplished to make it so?**
- **You're very busy and successful and yet you made time for this meeting; what's on your mind and what were you hoping to accomplish?**
- **What financial issue is currently causing you stress?**
- **What is your biggest financial concern around retirement?**
- **Have you ever worked with an advisor before, and if yes, what was that experience like?**
- **Is somebody currently managing your plan? And if yes, whom?**
- **What is your level of satisfaction with the performance of your current financial plan on a scale of one to ten: one being completely dissatisfied, ten being totally satisfied?**
- **What missing ingredient would make your financial plan perfect?**
- **What current financial obligation(s) are you most concerned about being able to fulfill?**
- **Does someone assist you in making your financial decisions?**
- **What is the most empowering advice you could imagine receiving from your meeting today?**
- **What is the greatest financial decision you have ever made?**
- **Why was it so powerful for you?**
- **What do you believe is your number one asset?**
- **What is the greatest financial lesson you learned from the great recession?**
- **Have your tactics, plans or investment strategies changed moving forward, and if yes, how so?**
- **Who do you look up to for financial guidance? Who is your mentor?**
- **If you became financially free, what valuable life work could you see yourself doing every day?**
- **What would I have to do to be referable in your eyes?**
- **What is your best decision regarding money?**
- **What is your worst decision regarding money?**

*Connecting good people with great ideas*

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