

Guided Discovery Questions for Advisors:

Working with the Emotional investor by Chris White and Richard Koonce

- Do you have a vision for your wealth and how you want to use it? If so, what specific goals or priorities do you have?
- What core values and principles are important to you when developing investment and estate plans?
- How do values such as achievement, knowledge, diversity, hard work, generosity, creativity, compassion, spirituality, justice, integrity, honesty, service, respect and love influence you when thinking about your wealth?
- What priorities do you want to include in your wealth management plans relative to financial inheritances by siblings, children, grandchildren and others?
- What responsibility, if any, do you feel you have to society or to causes and interests beyond your family and extended family?

3 Tips for Talking to Your Clients About Philanthropy by Jan Ridgely

- What's a community, national or international issue you're truly passionate about?
- What has motivated you to give to charity in the past?
- What was special about the cause or charity you chose?
- Is charitable giving a family value you want to share with the next generation?

How to talk about philanthropy with your clients? Heather Zack, JD, LLM, CAP

- What type of legacy do you want to leave?
- What issues are you most passionate about?
- What motivates your charitable giving?
- What values do you want to pass along to your family?

Foundation Source. How to talk to your clients about Philanthropy

- Are you currently making gifts to any charitable organizations? Which ones? How much?
- What are your philanthropic goals? Do you have current outstanding charitable gifts or pledges?
- Is there a minimum amount of money you would want to leave to your children? Is there a maximum? What are your concerns about wealth and your children?
- Are there charitable causes or specific organizations in your community that you'd like to support? What would enable you to do that?
- Are there personal goals that you've set and not accomplished? How could philanthropy help you achieve them?
- Have you ever entertained the thought of becoming a major donor?
- Would you like your philanthropic work to continue beyond your lifespan? Would you like your children to be able to be involved in their own philanthropy? With you?

29 Questions for better philanthropic conversations. Nathan Hand

1. What's the largest impact you've had on the world?
2. The world needs band aids AND solutions to social problems. Which do you prefer to invest in and why?
3. How do you plan on teaching your children about philanthropy?
4. Are you hoping they (your kids) have the same community values or different ones?
5. What's been your best giving experience?
6. What's been your worst?
7. What person has had the most influence on you and your life?
8. How do you and your spouse/family make your philanthropic decisions?
9. Do you prefer to give a little to several organizations or more to a few?
10. What are your top 3 philanthropic interests and why?
11. How long do you usually stick with an organization or issue?
12. If you could volunteer full time – what would you do?
13. How do you define success?
14. What led to you being successful?
15. How can we give others those same opportunities?

Ten Questions to Ask Clients about Their Charitable Giving by Ken Nopar

- Are you currently involved with any non-profit organizations? As a donor, volunteer, board member? Will you be more or less involved in the future?
- Do you normally support the same charities every year, or do these change from year to year?
- How do you decide which charities to support? Who is involved in the decisions?
- Do you give the same amount every year? Upon what does it depend?
- How do you decide how much to donate overall?
- How do you donate, with checks, appreciated stock, other asset or required minimum distributions (RMD) from your IRA (if the client is over 70)? Do you have a charitable vehicle, like a donor-advised fund or private foundation?
- Do you want to donate primarily during lifetime, at death or after death? If after death, who will make the decisions?
- Do you prefer to donate publicly or anonymously?
- Which past donations have given you the most satisfaction?
- Do you regret any past donations, or do you experience any frustrations in making your donations or keeping track of them?

Marty's Favorites

- How does charitable giving fit into your priorities?
- What keeps you up at night when you think about your wealth?
- Have you explored capturing your story so your Great Grandchildren will know your legacy?

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