

# Elevated Questions

Ask better questions, get better answers. Move from simple fact-finding into conscious conversations following the example scripts below. Continue to dive deeper by practicing active listening, asking open-ended questions, exploring conscious conversations and creating an opportunity to go deeper with "Tell Me More" questions.

	QUESTIONS	CONSCIOUS CONVERSATIONS	TELL ME MORE
GENERAL	<p>"Why are you here?"</p> <p>"What are your goals and passions?"</p>	<p>"If you had a magic wand, what would you like to change or improve in your life?"</p>	
FAMILY	<p>"Will your children attend private school K-12?"</p> <p>"What are your plans for college funding?"</p> <p>"Do any of your dependents have special needs?"</p> <p>"Do you plan on having additional children or grandchildren?"</p>	<p>"Are you satisfied with the depth of connection and quality time spent with those closest to you?"</p> <p>"Who do you love?"</p> <p>"Who do you take care of?"</p>	<p>(Positive family experiences brainstorm)</p>
CAREER	<p>"Tell me more about your career."</p> <p>"Do you anticipate any changes?"</p> <p>"What do you do?"</p>	<p>"Do you feel that your values and passions are aligned with what you do?"</p> <p>"Do you feel appreciated for your contributions at work?"</p>	<p>(Conduct Inspired Life Purpose Exercise)</p>



## QUESTIONS

## CONSCIOUS CONVERSATIONS

## TELL ME MORE

REAL ESTATE

"Do you have plans to remodel?"  
"If so, how much and by when?"  
"Do you have future real state investments planned?"

"How do you feel about where you live?"  
"Do you feel a sense of place?"

INVESTMENTS

"How much market risk are you willing to accept?"  
"On a scale of 1 to 10, with 1 being the lowest risk and 10 being the highest, what's your risk score?"

"Do you believe that your values are in sync with your investments?" (SRI/Impact)  
"Is this a priority to you?"

INSURANCE

"Have you had a review of your coverage and exposures?"  
"What are your plans for your own long-term care needs?"  
"What do you want insurance to do for you?"

"Have you had a loved one who needed LTC?"

RETIREMENT PLANNING

"Do you expect to work part-time in retirement?"  
"Are you willing to delay retirement if it helps fund your goals?"

"What would you be doing if you had all the time, money and support to do what you love?"

(90-year Life Diamond Chart)



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## QUESTIONS

## CONSCIOUS CONVERSATIONS

## TELL ME MORE

EXPENSES

"What are your fixed and discretionary expenses?"



"Do you believe you are in touch with and have control over your expenses?"

"Are you and your spouse on the same page with your spending?"



ESTATE PLANNING

"Do you have updated estate plans (will, trust, durable powers, living will)?"



"How would you like to pass this wisdom on to your family?"

"What advice would you give your younger self?"



CHARITABLE GIVING/  
PHILANTHROPY

"Do you have a Donor Advised Fund (DAF)?"

"What causes/nonprofit organizations are you passionate about supporting?"

"What role do you play in these organizations?" (\*Add to CRM)



"If you were on your deathbed today, what would you most regret not doing or trying?"

"Erase all that you have done to date. With the remainder of your life, what will your signature legacy be? "



PROFESSIONAL  
RELATIONSHIPS

"Are you happy with your advisory team?"

"Do you feel you have any gaps?"



"What would an ideal professional partnership look and feel like to you?"

