ARCHWAY STRATEGY

10 Discovery Questions to Drive Meaningful Conversations

1. Beyond financial goals, what are some personal aspirations or life experiences that are important to you and your family?
2. Can you share some insights into your family's values and how they might influence your financial decisions?
3. Are there any significant family dynamics or intergenerational considerations that you'd like to discuss?
4. What are some of your hobbies, interests, or passions outside of the financial realm?
5. How do you envision spending your leisure time during retirement or when you have More flexibility?
6. What is your preferred communication style and frequency when working with Advisors and professionals?
7. Are there any causes or charitable organizations that hold a special place in your heart, and how do you like to engage philanthropy?
8. Can you tell me about your circle of advisors and professionals (legal, tax, etc.), and how would you like me to collaborate with them?
9. How do you handle life transitions or significant events, and how can we support you during those times?
10. Are there any non-financial challenges or concerns that you'd like to discuss or receive guidance on?