

1. How did you hear about us and what do you know about our company?
2. What are you currently doing in preparation for your financial future?
3. What do you like most about what you are doing?
4. What don't you like about your current financial position?
5. What would you like to see enhanced or improved?
6. What has been your experience with preparing for your financial future?
7. What would you ideally like to accomplish with your strategy?
8. What's your process for making decisions?
9. Is there anything that keeps you up at night?
10. When it comes to your money, the one thing you care most about is?