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|  | Discovery planningStrengths, opportunities and fears questions |

Questions are grouped in three general areas: strengths, opportunities and fears.

Strengths

* What is the foundation of your financial structure?
* What do you own? What are your significant assets?
* What are some of the best financial decisions you’ve made in your lifetime?

Opportunities

* What are you trying to accomplish or build?
* What do you want your money to do for you?
* If we were sitting here a year from now, what has to happen in order for you to achieve your financial goals?
* What would you like to leave as a legacy for your partners and heirs?
* If you had all the money that you’d ever need, what would you do differently with your life?
* How do you define success in your financial life?
* Where do you want to get to and how do you envisage spending your time when you’re there?
* If you won the lottery tomorrow, what would you do with the money? How would your life change?
* What is your ultimate goal in life?

Fears

* What keeps you awake at night?
* What are your greatest concerns going forward?
* What money mistakes have you made in the past?
* What issues stand between you and the realization of your goals?
* Who are the people who are most affected by the financial decisions you make?
* What do you owe?
* What are you struggling with?
* What is the most important financial consideration in your life right now?
* What is the biggest threat to your financial security?
* What is the weakest link in your financial picture?
* What are the holes in your current financial plan?
* What are the possible, but unexpected, problems that could affect your long-term financial security?
* What is the one thing that happened to you during the past few months that made you stop, think and question whether you were financially well situated?