

Questions to Encourage Conversation

1. Where did you each grow up?
2. Tell me how you met.
3. Tell me about your first date.
4. When did you get married? What is your wedding anniversary?
5. Do you have children? How many? Tell me about each one and where they live.
6. Do you have grandchildren? How many? What are the ages?
7. Do you have any pets? What kind? What are their names? How old are they?
8. How did you get to Midland?
9. Tell me about your work history.
10. What do you love about your job?
11. What is the biggest challenge with your job?
12. If you could have any job in the world, what would it be?
13. Do you plan on working in retirement? If so, what would you like to do?
14. Do you have any hobbies that you want to pursue in retirement? What are they?
15. What are your two biggest concerns about retirement?
16. What is one dream or aspiration that you have for retirement?
17. What do you envision retirement looking like for the two of you?
18. Do you have any major purchases in the first 5 years of retirement?
19. Do you plan on moving when you retire?
20. Do you plan on purchasing a new home in retirement?
21. Are you involved in a church or volunteering somewhere? If so, where do you volunteer and why is that important to you?
22. Do you enjoy traveling? What has been one of your favorite trips ever?
23. Are you wanting to travel in retirement? What are some of your "bucket list" destinations?
24. Are you desiring to leave an inheritance to your children?
25. If you died tomorrow, what impact do you think this inheritance, as you currently have things set up, would have on each of your children? Would the money enhance their lives or potentially harm it in any way?
26. One year after you retire, you look back on that year and have experienced the retirement of your dreams....what does that look like?
27. What would you do different if you "had the money" (if money was not a limiting factor)?
28. Are there any investments that you would avoid as a matter of principle?
29. When making financial decisions, who or what are your main sources of financial information?
30. What is one major thing that you would like to do before you die?
31. How is knowing that you aren't going to run out of money in retirement improve your peace of mind?
32. What are your thoughts on Social Security? When do you anticipate turning it on?
33. How would you like to be remembered after you are gone? What do you want people to say about you?
34. What would you like to get out of today's meeting?