

Getting investor clients to open up and talk about their goals can help you guide them in making more thoughtful and personal financial decisions. Sometimes it's all about asking the right questions ... in the right way.

Charitable giving is an area where conversations count. Instead of yes/no questions or fillable fact sheets, consider open-ended inquiries. They can take you in unexpected directions and surface information that gives you deeper insight into the client's needs and services you can provide.

Get started with this list of discovery questions to help have richer conversations with clients who have charitable intentions but don't know where to start.

TIP: To get the conversation started, download our [How to make the most of your charitable giving](#) on ways to give smartly.

Understanding the family dynamic and interests

- How does your family spend the holidays/family vacations/summertime?
- What are your favorite things to do with your children/grandchildren?
- What are your children's/grandchildren's favorite subjects in school? What are their extracurricular activities?
- What does your family talk about around the dinner table?
- What do you and your family like to do together?

Assessing their current charitable involvement

- Tell me about any charity events that you participated in this year, or even just attended as a guest.
- Tell me about your and your family's current volunteer engagements. Are you or any of your family members on the board of any school or hospital or other charitable organization?
- Tell me about your charitable giving over the last year or two – events you've attended, causes you've given to, assets that you've given (e.g., cash, appreciated securities, etc.).
- Tell me about the causes that you both support (through time or donations), and the causes that each of you support independently.

Process for determining their charitable recipients

- How do you usually feel/respond when you're asked to make a charitable contribution? Is your answer different if the request is from a close friend or colleague?
- (If clients are spouses) What is your process for deciding to make a charitable contribution? For example, do you discuss every gift with each other before making the gift, or only gifts of a certain size or structure? Do you set charitable giving amounts/goals annually? Is it only a year-end conversation?

Understanding their long-term charitable giving plans

- Tell me about your plans for retirement.
- Tell me about your charitable intentions at death, if any.

The logistics of giving

- How involved is your CPA/attorney with your charitable giving? Do you speak with them BEFORE you make a charitable gift?
- Tell me about the types of assets you use to make charitable gifts? Have you ever donated anything besides cash to a charitable organization?
- Have you ever contributed to a donor-advised fund?

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