DISCOVERING CLIENT HOBBIES, INTERESTS & ACTIVITIES

**OVERVIEW**

Becoming your clients most trusted advisor requires that you slow down and take the time to get to really know them at a deeper level and beyond the numbers. One of the best ways to do that is by understanding their interests and hobbies. Below you will find sample questions specifically designed for this purpose that you can copy and paste and put into your own branding as well as a sample email communication to get you started.

**SAMPLE EMAIL:**

Hi [Client name],

As your financial advisor, I believe it's crucial to understand not only your financial goals and aspirations but also the things that bring you joy and fulfillment in life. To provide you with the best possible financial guidance and advice, I would like to learn more about your hobbies, interests, and activities beyond your financial matters.

By gaining insight into your personal interests and what occupies your time, I can better tailor our discussions and recommendations to align with your values and lifestyle. This will allow us to develop a more holistic plan that addresses your financial objectives and integrates your broader interests.

To facilitate this process, I have prepared a questionnaire that covers various aspects of your personal life, hobbies and preferences. This questionnaire will help me understand your passions, leisure activities and other areas that make you who you are beyond the numbers.

I encourage you to take the time to complete the questionnaire thoughtfully and thoroughly. The information you provide will remain confidential and will only be used to enhance our collaboration and help ensure that our work together aligns with your unique circumstances.

Please let me know if you have any questions or concerns about the questionnaire. I appreciate your willingness to share this information, as it will enable me to serve you better and provide advice that is truly customized to your needs and interests.

Thank you for your cooperation, and I look forward to our continued partnership.

Best regards,
[Your Name]

HOBBIES, INTERESTS & ACTIVITIES QUESTIONNAIRE

1. What activities do you enjoy during your leisure time? Please provide specific examples.
2. Are there any sports or physical activities that you actively participate in or follow? If yes, please specify.
3. Beyond work and finances, what fascinates you most? (I.e. a hobby, area of study or topic of interest.)
4. Are you affiliated with any clubs, organizations or community groups that align with your personal interests?
5. Do you engage in any artistic/creative activities? (I.e. painting, writing, photography or another form of expression.)
6. Do you have a favorite genre of book that you enjoy reading? If so, please share.
7. Which musicians, bands, or genres of music do you find most appealing/frequently listen to?
8. Are there any movies, TV shows, or genres that captivate your attention? If yes, please share examples.
9. Have you traveled to any remarkable destinations or had any extraordinary travel experiences? If so, please share a few highlights.
10. Are you involved in any philanthropic or volunteer activities? If yes, please describe your areas of focus.
11. How do you like to spend time with your family or friends? Are there any activities you enjoy together?
12. Are there any cuisines or culinary experiences that you find intriguing or enjoy exploring?
13. Do you have any ongoing educational goals? If yes, what subjects or areas interest you?
14. Do you collect anything or have a passion for any type of collection? If so, please elaborate.
15. Is there anything else you would like to share about your personal interests, hobbies, or activities that can help us better understand you as an individual?