

Table 2: Highest Good Questions to Identify Underlying Needs

Financial Planner Question	Client Response
Why would you like to retire early?	I would like to be able to decide what I do with my time. I want to explore brewing and other hobbies that I cannot with the current demands of my job.
What do you think paying for your kid's college will help you achieve?	I would like them to be able to do something they truly love doing as we have done, and I worry that they may have so much debt that they cannot pursue certain careers.
Are there any concerns about the effect on your other goals of purchasing this home?	We would rather live in a home that requires some work but allows us to be close enough to our daughter's music lessons and other activities downtown. We prefer shorter commutes if they do not inhibit our ability to achieve our other goals.