

There are Three Crucial Questions you must always be able to answer in a story:

1. What does the hero (client) want? (to matter, to make a difference, to leave a legacy, to pass on her values through her story, to change her part of the world)
2. What is the problem; what is in the way; who or what is the enemy? Try to address the internal problem. You will hear and understand the external problems, but keep asking questions to help define the internal problem (fear of not having enough, lack of knowledge, aversion to focus on death, insecure about ability to make a difference)
3. What does success or failure look like for the hero/client? (Less joy, wrong legacy, more taxes, less fulfillment)

People, ie clients, want to know if you can help them, not what they can do for you. You have the opportunity to guide your clients, helping them be the hero in their stories and estate plans. And when you guide your clients along the path of the hero's journey (the discovery process), they avoid pitfalls and, more importantly, the fears and worries. Then they achieve a resolution that is likely more than they imagined.

The best result is not the perfect set of documents, it's a satisfied client who has discovered her "Why" and understands the values and story she wants to pass on to her family, the legacy she wants to leave, and the difference she wants to make today and tomorrow. To do this, reframe the relationship. Your performance, your products step out of the limelight and take on the supporting role in the discovery of her values and purpose and the plan to implement them ([www.wealthmanagement.com/business-planning/why-values-integration-key-practice-management](http://www.wealthmanagement.com/business-planning/why-values-integration-key-practice-management)).

#### ~Slide 6 - Second Fundamental~

## II. Second Fundamental - Start with "Why"

#### ~Slides 7 - True North~

The second fundamental to learn about planned giving is that the why comes before the how. This is where you find out what your client - the hero - wants. What is her true north?

#### ~Slide 8 - Values~

Specifically for planned giving, find out if your client has charitable intent by asking discerning questions. Then listen, really listen. And ask more questions. "And then?" It's a process that you guide with **values-based questions**. Don't be surprised that it takes a few, or more, meetings.

#### ~Slide 9 - Graduated Coin Jars~

They may not believe they can be philanthropists, but they do want to pass on values. And one of the best ways to pass on values, to matter, to make a difference is to leave a legacy with a planned gift. I've worked on estate gifts from \$40 to \$6,000,000. Each of those donors, and