



# Engage in meaningful conversations with your financial adviser

Client note

When you talk about your money, you're really talking about your hopes, dreams and concerns for the future. Below are questions to help trigger some important areas of conversation for you and your adviser.

- 1 What should your adviser understand about your family? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 2 What worries keep you up at night? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 3 How prepared are your spouse/partner and heirs to handle the finances after your death? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 4 If you could wave a wand and take away your problems, what would that scenario look like? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 5 Who else besides your financial adviser do you turn to for help or advice with insurance, retirement, real estate, tax or financial planning needs? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 6 What was the best interaction you and your adviser have had recently? What was the worst? Was there a conversation you and your adviser should have had but didn't? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 7 What tools would help you feel more in control of your financial future? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Connect with Vanguard™** > [vanguard.com.au](http://vanguard.com.au) > 1300 655 101



**Vanguard®**

Vanguard Investments Australia Ltd (ABN 72 072 881 086 / AFS Licence 227263) is the product issuer. We have not taken your circumstances into account when preparing this information so it may not be applicable to your circumstances. You should consider your circumstances and our Product Disclosure Statements ("PDSs") before making any investment decision. You can access our PDSs at [vanguard.com.au](http://vanguard.com.au) or by calling 1300 655 101. Past performance is not an indication of future performance. This information was prepared in good faith and we accept no liability for any errors or omissions. © 2016 Vanguard Investments Australia Ltd. All rights reserved.  
AATKCBPDPMS\_112016