Advisor Scripts: Charitable Giving and Purpose in the next season

These 10 conversation approaches are intended for financial advisors working with retired or exited business owners who are exploring how to align their charitable giving and use of wealth ("treasure") with personal meaning and purpose.

1. Let's Talk About What Your Money *Means*

> *Advisor Prompt:*
> *"You've worked hard to create wealth. But wealth isn't just a number—it can be a messenger. What message do you want your giving to send about who you are and what you stand for?"*

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2. Tell Me a Story About Generosity

> *Advisor Prompt:*
> *"Was there ever a time when someone's generosity changed your life—or your outlook? What stayed with you from that experience?"*

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3. What Injustice or Need Do You Refuse to Ignore?

> *Advisor Prompt:*
> *"In a world full of needs, is there one cause or injustice that stirs something in you—something you feel called to respond to?"*

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4. What Legacy Would Feel Worthy of Your Life's Work?

> *Advisor Prompt:*
> *"Imagine it's 25 years from now. Someone is describing the impact of your charitable giving. What do you hope they say? What will have made it meaningful—not just generous?"*

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5. What Do You Want Your Grandchildren to Understand About You Through Your Giving?

Advisor Prompt:
"How can your charitable choices today become a kind of letter to future generations about what mattered most to you?"

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6. Is There a Wound You Want to Help Heal?

Advisor Prompt:
"Sometimes we're drawn to causes that reflect a pain or injustice we've lived through. Are there any experiences that now call you to give in a way that brings healing—for others or even for yourself?"

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7. What Kind of Giving Energizes You?

Advisor Prompt:
*"Some giving feels like duty. Other giving feels like joy. What types of generosity light you up? Let's design your charitable strategy around *that.*"*

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8. Do You Want to Be a Supporter or a Builder?

Advisor Prompt:
"Some people like to quietly fund good work. Others want to build something new. Where do you see yourself—supporting an existing mission, or helping create something from the ground up?"

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9. If You Could Only Fund One Project for the Next 10 Years...

Advisor Prompt:
*"Let's get clear. If you had to choose *one cause* to fund for the next decade—what would it be? And why does it matter so much?"*

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10. What's Calling You Now That Wasn't Possible Before?

Advisor Prompt:
"Now that your business exit has freed up time and capital—what feels like it's calling you? What wasn't possible before, but now might be?"