

CONFIRMATION BIAS PLANNER

We tend to look for, remember, and over-value information that re-affirms what we already know or believe.

CLIENT _____ DATE _____

What is their risk tolerance? Investing style?

What is their general outlook? How optimistic are they?

What's their view of the markets?

Who or what are they listening to the most? Why?

What do they need to experience for themselves?

Where could they do their own math vs. listen to mine?

Where should I be getting others to say it instead of me?

Where can I start from areas of agreement to address issues?

What questions will help them come to helpful conclusions?

