


IMPACT INVESTING: START BY LISTENING

Impact investing is a great way to create deeper, more meaningful intergenerational relationships with your clients. Here are 10 questions to help get the conversation started.

- ① Are you interested in becoming more connected with your investments?
- ② Is it helpful to know how your investments are impacting others/the environment?
- ③ Are there any key issues that you would like to invest in?
- ④ What does it mean to you to be a steward of your investment capital?
- ⑤ Have you considered the non-financial outcomes of your investment portfolio?
- ⑥ Is your capital doing what you want it to do for you and others?
- ⑦ What does the power of capital mean to you?
- ⑧ Do you have an interest to align your values and your investment portfolio?
- ⑨ Have you heard of the sustainable development goals? (SDGs)
- ⑩ What if you could invest in themes that align with your charitable dollars?

Over 80% of women and millennials are interested in integrating their values into their investing. [MORGANSTANLEY.COM](https://www.morganstanley.com) 

\$68 Trillion could change hands over The Great Wealth Transfer in the next 25 years. [CERULLI.COM](https://www.cerulli.com) 

Only 12% said they have heard about sustainable investing from a personal financial advisor. [BUSINESSWIRE.COM](https://www.businesswire.com) 



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