

APPRECIATIVE INQUIRY WORKSHEET

Client Name: _____

Date: _____

SITUATIONAL

1. How do you describe yourself/personality?

2. Tell me what is working well in your current situation?

3. What would you like to see for yourself in the future?

4. What aspects of your life would you like to build upon?

5. Tell me about a typical day for you?

6. Have you decided where are are going and how you will get there? (Selling vs. Staying)

SOCIAL/EMOTIONAL

7. How do you feel about where you are at in your life?

Identify. Align. Execute

8. Tell me about your friends/family?

9. Who are the closest people to you, logistically and emotionally? Tell me how they support your well-being. What do you love about them?

LEGAL/FINANCIAL

10. Tell me about your financial affairs. What arrangements have you made or would like to make?

11. Have you thought about where you would like to be in your future and how you will fund that option?

12. Are you familiar with the options available to you and what the associated costs are?

WELL-BEING/HEALTH

13. What does well-being/health mean to you?

14. What brings you joy? What can you not live without?
