# GUIDED BY FAITH. ALIGNED WITH VALUES.

How to Engage Your Clients in Faith-Based Investing

A Resource for Financial Professionals



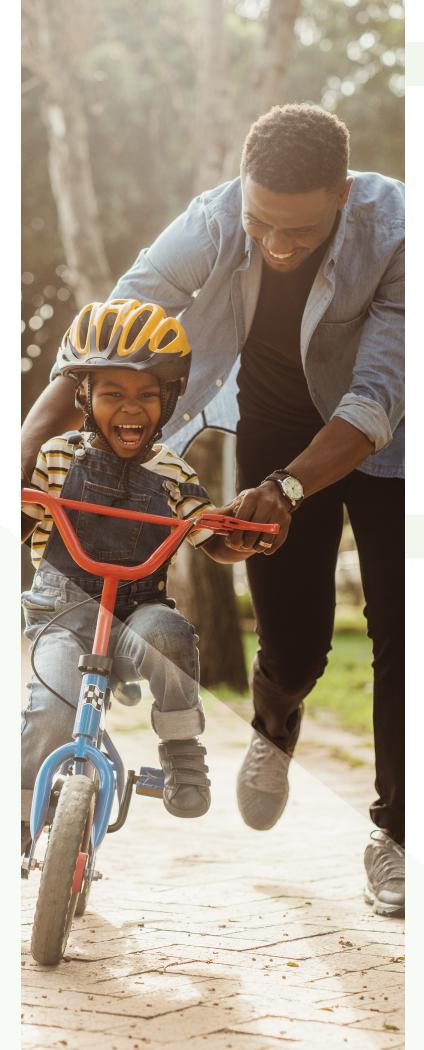
FOR INSTITUTIONAL USE / NOT FOR PUBLIC DISTRIBUTION

## ASKING QUESTIONS TO BETTER UNDERSTAND YOUR CLIENT

A discovery conversation can be a dynamic opportunity for you to more fully understand your clients' motivations, objectives and expectations and allow you to obtain important information beyond just financial and demographic data.

Sincere, open-ended questions may lead to some surprising answers and informative discussions, fostering the growth of trust and loyalty in an ongoing professional relationship.

When discussing faith-based investing, consider asking these types of questions to gain a deeper understanding of who your clients are on a more meaningful level.



#### **ASSESSING CLIENT MOTIVATIONS**



How does your faith factor into the way you live your life and handle your finances?

2

What causes are you passionate about, and how do you help them meet their mission?



If you had to give all your money away, what would you do with it?

4 How d utilize missio

How does your faith influence the way you utilize your time and resources (e.g., tithing, mission trips, Bible studies, etc.)?

#### **ENSURING CLIENT EXPECTATIONS**



How would you prefer for your financial advisor to communicate with you about the incorporation of your values within your portfolio?



What do you hope to achieve by adding faith-based investments to your portfolio?



What is the best way to engage with your financial advisor should you desire to make adjustments to your portfolio to better reflect your faith-based allocations?



Would you be open to having investments that make a faith- based impact in addition to generating a financial return?

### **IDENTIFYING CLIENT OBJECTIVES**



How do you want to use your financial resources to make an impact in the world?



Are you interested in adding faith-based investments to your portfolio?



How and to what degree do you envision your values intersecting with your financial decisions?



How do you envision the use of your financial resources contributing to your legacy?

#### IMPORTANT INFORMATION

Investing involves risk. Principal loss is possible. Funds invested in accordance with the faith-based investment restrictions of GuideStone Financial Resources may not be able to take advantage of certain investment opportunities due to these restrictions, which may adversely affect investment performance.

You should carefully consider the investment objectives, risks, charges and expenses of the GuideStone Funds<sup>®</sup> before investing. For a copy of the prospectus with this and other information about the Funds, please call 1-888-GS-FUNDS (1-888-473-8637) or visit GuideStoneFunds.com/Funds to view or download a prospectus. You should read the prospectus carefully before investing.

The Fund may experience negative performance. Past performance does not guarantee future results.

GuideStone Funds<sup>®</sup> shares are distributed by Foreside Funds Distributors LLC, not an advisor affiliate. GuideStone Capital Management, LLC<sup>®</sup>, an affiliate of GuideStone Financial Resources<sup>®</sup>, provides investment advisory services for the Funds.





