

# GUIDED BY FAITH. ALIGNED WITH VALUES.

How to Engage Your Clients in Faith-Based Investing

A Resource for Financial Professionals

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GuideStone®  
Funds



# 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

- 1 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?
- 3 If you had to give all your money away, what would you do with it?
- 4 How does your faith influence the way you utilize your time and resources (e.g., tithing, mission trips, Bible studies, etc.)?

## IDENTIFYING CLIENT OBJECTIVES

- 1 How do you want to use your financial resources to make an impact in the world?
- 2 Are you interested in adding faith-based investments to your portfolio?
- 3 How and to what degree do you envision your values intersecting with your financial decisions?
- 4 How do you envision the use of your financial resources contributing to your legacy?

## ENSURING CLIENT EXPECTATIONS

- 1 How would you prefer for your financial advisor to communicate with you about the incorporation of your values within your portfolio?
- 2 What do you hope to achieve by adding faith-based investments to your portfolio?
- 3 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?
- 4 Would you be open to having investments that make a faith- based impact in addition to generating a financial return?

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® 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.

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