

What People Want

WHAT PEOPLE WANT

WHO	WHAT	WHY	HOW
wants something?	are they hoping for?	do they think they are entitled?	do I feel about it?
Stepdaughter: Lillian	A significant portion of Bill's estate.	She and Bill were close. She feels she deserves it.	I feel hurt and worried.
Stepson: James	Bill's war medals.	Bill promised them to him.	I would love James to have them.



CI Investments
 Canada's Investment Company

Purpose:

With the death of a loved one comes a slew of emotions, particularly when a client loses their spouse/life partner. Often, friends or family members have expectations about what they'll receive from the estate. The client may be approached soon after their partner's death, when they are vulnerable and unprepared. This tool can be used to help your clients prepare for requests for money or other items and protect them from those who may not have their best intentions at heart.

Use with:

Current or prospective clients who have suffered the loss of their spouse/life partner.

Instructions:

Use this tool as soon as your client is ready after their partner's death.

1. Start by identifying those family members or friends who may have an expectation or may ask for something directly from the client.
2. Identify what that individual may be hoping for and why they feel entitled.
3. The final and most important step is to uncover how your client feels about this expectation.

Completing this grid gives your client breathing space to think about how they feel and helps them to be prepared for requests from those around them.

WHAT PEOPLE WANT

 WHO wants something?	 WHAT are they hoping for?	 WHY do they think they are entitled?	 HOW do I feel about it?