[BUsiness Name]

Conducted on: [date]

Location: [location]

By: [your name]

Focus Group

Discussion guide

**Objectives:**

The objective of this focus group is to gather general perceptions, descriptions of needs and overall views of individuals that are [target market]. This information will be collected in an anonymous nature as the information collected per individual is not as important as the collective views of the group as a whole.

The information gathered in this focus group will be utilized by [Advisor’s Firm] to further develop a business plan that will incorporate the findings from this study. For example, if a certain topic is found to be very important to [target market], then [Advisor’s Firm] will research the possibility of creating special solutions to address that topic. Or if a topic is found to be viewed as unnecessary, then [advisor’s firm] would spend no more time developing that topic.

**Rules:**

1. We ask that all discussions remain friendly and all participants respect each other’s opinions. Remember, in a focus group like this…ALL answers are correct!
2. Due to the limited amount of time, we ask that you try to keep comments, observations and feedback limited to the topics being covered. Please excuse the facilitator if during the conversation they steer you or others back on topic.
3. We are more interested in your opinions as they apply to <<Target market >> than about your specific situation. If you wish to share personal experiences you are welcome, but it is not necessary.
4. We will be recording this meeting simply to make sure that we do not miss any of your comments or feedback. If there is anyone who objects to this please let me know.
5. We ask that you remain for the full 60 minutes, as at least that much time will be needed to cover the topics fully.
6. If you need to use the lavatory, please excuse yourself and leave your materials in the room and come back when you are able.

**Welcome and Introductions**

**Discussion Topics:**

1. Caregiver’s Resource Guide

**Importance of individual being familiar with topic** (Please circle one)

1 2 3 4 5

*Not important→→→→→→→→→→→→→→→Very Important*

 **Importance of Financial Advisor covering topic** (Please circle one)

1 2 3 4 5

 *Not important→→→→→→→→→→→→→→→Very Important*

1. (Next topic or solution you wish to present)

**Importance of individual being familiar with topic** (Please circle one)

1 2 3 4 5

*Not important→→→→→→→→→→→→→→→Very Important*

 **Importance of Financial Advisor covering topic** (Please circle one)

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 *Not important→→→→→→→→→→→→→→→Very Important*

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 *Not important→→→→→→→→→→→→→→→Very Important*

**Summary**

Thank You for your valuable input!