

Interview Steps:

- 1) Find someone to interview - make sure the knowledge gap between you isn't too large so you can communicate their thoughts effectively.
- 2) Send them the survey link: [Forms.gle/AjD7pHKK6kzzX2Xf8](https://forms.gle/AjD7pHKK6kzzX2Xf8)
- 3) Go through the following questions at your discretion and **take notes!!!!** The interviews are only helpful if we record the information from them. Think about follow up questions you can ask to really understand the person you are interviewing.

Investor Name:

What did the start of your investing journey look like?

What made you want to get into investing?

What shaped your opinions after starting?

What do you wish you knew when you started investing? Or if you were starting from the beginning, what would you have done differently?

What do you want to know/learn more about now?

What are some struggles you have with investing?

What is your favorite method to learn about investing? What do you like about it?

What is your favorite method to learn about investments? What do you like about it?

What are your financial goals for investing?

What steps have you taken to reach these goals?

What steps do you plan to take to continue pursuing these goals?

What are the top three things you look for in a company when investing?

What is advice you would give to a new investor?

What would you want from a generic AI chatbot (not just financial)?

What about a finance AI chatbot specifically?

What are some concerns you have with AI?

What questions might you ask the OpenFinAL bot?