

Ask All The Questions:

258

**Business Questions You
Should Answer Today.**

MICHAEL J LEE

Mention of specific companies, organizations, or authorities in this book does not imply endorsement by the author or publisher, nor does mention of specific companies, organizations, or authorities imply that they endorse this book, its author, or the publisher.

Copyright © 2022 by Michael J Lee.

All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher and author, Michael J Lee.

Published in the United States by Achievement House, an imprint of Michael Matthew Publishing. Fernandina Beach, Florida.

Achievement House and the Shark colophon are trademarks of Michael Matthew Publishing.

LoC Control Number: 2022943417

ISBN eBook 978-1-7340748-7-1

Paperback 978-1-7340748-8-8



Achievement House

**Inspiring progress, freedom,
happiness, and love globally.**

This book is dedicated to my children who will hopefully use these questions to do great things.

 @_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

Contents

Relationships.....	8
How to Use This Resource	15
Vision.....	18
Fundamentals.....	19
Innovation	21
Blue Ocean.....	21
How To Identify Innovative Opportunity	22
Values.....	23
Methods.....	25
Operations.....	26
Leadership.....	28
Teams	30
Meetings.....	31
Change Management.....	32
Decisions.....	34
Time Management.....	36
Communication	37
Questioning others	39

Including Others.....	39
Appreciation	40
Aspirational.....	40
Sharing.....	41
Forward Thinking.....	41
Open Dialogue.....	42
Harmonizing.....	43
Branding.....	44
Message	44
Values.....	45
Know your Customer	45
Positioning Statement	46
Employee Evaluations	47
Obstacles	48
Contrarian Thinking.....	49
Goals	51
Plan Analysis	52
Argument Dissection.....	54
Challenging Assumptions.....	56
Measurements.....	58

Goals.....	60
Quantify the goal - Set the target ...	60
Profit.....	62
Why Businesses Fail.....	64
About the Author	70

Relationships

When I talk about what great businesses look like, I talk about relationships. Relationships are the core of amazing companies and also the key to a great life. But we're talking about businesses here and how to make yours a great one, not mediocre or a former business like what happens to most of them. This isn't a relationship book, but the concept is the same. Asking questions is the single most important activity you can

do to establish solid, loving, meaningful, and lasting business, friend, and romantic relationships.

Regarding romantic relationships, you must first ask yourself questions about what your ideal long-term relationship looks like. These questions involve geography, sex, children, lifestyle, money, work/life balance, etc. Getting this future Vision right, for now, is imperative – with the understanding it will change as you get older.

After you determine what the ideal relationship looks like, you must ask more questions of yourself so that you can be positive of who you are and what type of person you require for a long-term relationship. After thoroughly analyzing yourself and are completely happy with who you are and the Values you stand for, you should then begin asking questions to yourself about what type of person would be best for you.

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

On the contrary, if you determine that who you are now is not who you want to be, you then must first create a plan to acquire the qualities you wish to possess in order to fill the gap. This may involve education, gaining a new experience, improving your skills, or even completely reinventing yourself. Then you can begin to seek out the person for the perfect relationship. With the understanding that nothing stays the same, especially humans as we get older, you must regularly go through this questioning process in order to adapt and adjust to a dynamic relationship.

When you know what type of person you are looking for, you can then begin your quest for someone that possesses those qualities. But there are so many paths to take to find the right people. Do you use dating apps, or physically go where they hang out, or social media, or blind dates set up by your friends? To be efficient and successful in this stage, you must ask a

number of questions to determine what Methods will work best for you. Then you are nearly ready to start searching.

Relationships themselves can be really hard and trying to find a great one will be challenging. Many Obstacles will stand in your way. Asking the appropriate questions to uncover these obstacles will help you develop methods to overcome them. Armed with this knowledge, you can avoid common pitfalls and especially the emotional trauma that comes with dating.

Lastly, as an analyst, I like to track my progress. I prefer to record or journal my experience as I implement my methods so that I can do more of what is working and less of what is not working. Additionally, these Measurements will help me find ways to make what isn't working well work better.

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

Building a great for-profit business, or any organization for that matter, is exactly like building a great relationship. In fact, it is exactly the same. A business, or organization, is a group of people comingled in a web of intricate relationships working together to achieve several goals. Usually, this organization has one overarching goal such as the monetary profit for a for-profit business. The profit in a personal relationship is the feelings, security, love, and everything else that is wonderful in a great romantic, friend, family, etc., relationship.

An organization of people to earn a monetary profit is an organization of relationships. There's a relationship between the customer and the business. Relationships between executives and managers. Relationships between managers and staff. Relationships between purchasers and suppliers. Relationships between AP and

procurement. Relationships between marketing and finance and on and on. You get the point.

And the primary way to establish a great relationship is....???

That's right, we must ask questions and lots of them. We must not only ask questions for today but continue to ask them as the relationship progresses. This is completely necessary because nothing stays the same, especially emotional humans. Now you understand the importance of questions. The following pages are all the questions you should ask to build an amazing organization whether for profit or not.

How to Use This Resource

I've asked all of these questions in consulting engagements, as an executive, and as an employee. I've asked them mostly as an investor. You will never ask too many questions when you're deciding to trade hard earned assets for interest in a company someone else manages.

I will only take a concentrated position in companies that have asked, continue to ask, and have successfully answered all or most of these questions. Officers that adhere to this process and subscribe to this type of management will consistently outperform their competition and retain a high probability of financial and organizational success.

While it may seem daunting to ask and answer all of these questions, you must understand they can't and shouldn't be asked in one go around.

As scenarios present themselves in accordance with a well-structured

strategic plan, managers and executives will use this resource to ensure they are asking appropriate questions and become confident they have covered most of their bases.

I've organized these questions in a way that you can skip to the sections you feel are most relevant at the moment. However, if you are starting a new organization, it will be useful to ask them in order as you build each piece.

I thought a lot about interpreting them like I've seen in other publications. However, I think it's best for you and your team to do the interpretation. It'll provide more insight into each question and the answer(s). Plus, I won't fill these pages with a lot of words you don't want to read and avoiding the dreaded TLDR:-)

So, waste no more time and get to asking.

Vision

*“Create a vision for the
life you really want and
then work relentlessly
towards making it a
reality.”*

— Roy T. Bennett, *The
Light in the Heart*

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

Fundamentals

*“In a time of crisis, one
returns to the basics, to
the simple fundamentals
which support and sustain
life.”*

— Marty Rubin

1. Why do we exist?
2. Why do customers want to do business with us?
3. How do we make customer's lives better?
4. How do we love our customers?
5. How do we love our employees?
6. How do we love our industries?
7. Who is our community?
8. How do we love our community?
9. What is our greater cause?
10. What are we good at?

11. What do we do?
12. Where will we be in 5 years?
13. What capabilities must be developed or acquired?
14. Are we satisfying a social need with a business opportunity?

Innovation

*“If you want something
new, you have to stop
doing something old”*

— Peter Drucker

Blue Ocean

15. What can we eliminate?
16. What can we reduce?
17. What can we raise the bar on?
18. What can we create that is new?

How To Identify Innovative Opportunity

19. Has there been an unexpected success or failure?
20. Are there incongruities in the process, production, distribution, or customer behavior?
21. Are there unaddressed process needs?
22. Have there been changes in industry or market structure?
23. Have there been changes in demographics?
24. Is there new knowledge?

Values

*“It is no measure of
health to be well adjusted
to a profoundly sick
society.”*

— J. Krishnamurti

25. How do we behave?
26. What do we stand for?
27. What do we tolerate?
28. What are our core values – our identity?
29. What values do we want to have?

Methods

*“Shall we educate
ourselves in what is
known, and then casting
away all we have
acquired, turn to
ignorance for aid to guide
us among the unknown?”*

— *Michael Faraday*

Operations

“It was clearly a lot more difficult in the field than in the office, where you could keep your distance and maintain a calculated composure. Being faced with real people was a far tougher call on one’s judgement.”

*— Sara Sheridan,
Brighton Belle*

30. What is working well?
31. What is not working well?
32. What we can do to make the things that are not working well, work?
33. What is most important, right now?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

34. If we do anything between now and the end of the year, what should it be?
35. What's the size of the market and where's it heading?
36. How will we succeed?
37. What is our plan for success (our strategy)?
38. Who will help us?
39. Who must do what?
40. What is everyone great at?
41. What is everyone poor at?
42. What activities will express our values and reach toward our vision?
43. What do we want?
44. What do we have?
45. What will we do?
46. Have we separated entrepreneurial projects from the mature and existing business?
47. Are we asking all the questions?

Leadership

*“Our chief want is
someone who will inspire
us to be what we know we
could be.”*

— *Ralph Waldo
Emerson*

48. Can the business function day to day without me?
49. What does my team need from me to make their contribution to the organization?
50. When do they need it?
51. How do they need it?
52. In what form?
53. What do I need as a leader?
54. What knowledge and skill should I acquire to make the contribution expected of me?
55. What strengths must I put to work?

56. What standards do I set for myself?

Teams

*“The strength of the team
is each individual
member. The strength of
each member is the team.”*

— Phil Jackson

57. Does the team fill the necessary roles well?
58. Is each team member doing the right work within their respective roles?
59. Does my team understand their assignment?
60. Do their teams understand their assignments?
61. Who are we?
62. Who are we becoming?
63. How will a new hire fit into our culture?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

Meetings

*“People who enjoy
meetings should not be in
charge of anything.”*

— *Thomas Sowell, Ever
Wonder Why? and Other
Controversial Essays*

64. Are we asking questions or making statements?
65. Are we telling what’s on our minds or trying to persuade others that our views are right?
66. Ask the presenter: What assumptions do you hold that we should consider?
67. Are we giving each other space to speak and share?
68. What are they here to teach me?

Change Management

*“The snake which cannot
cast its skin has to die.”*

— Friedrich Nietzsche

69. What new opportunities can be created to fulfill our purpose and mission by transforming it into a different business?
70. Are our products, services, processes, markets, end uses, distribution channels still viable?
71. Are they likely to remain viable?
72. Do they still give value to the customer?
73. Are they likely to give value to the customer in the future?

74. Do they still fit the realities of the population, markets, technology, and economy?
75. How can we best abandon them?

Decisions

“Crying is all right in its way while it lasts. But you have to stop sooner or later, and then you still have to decide what to do.”

— C.S. Lewis, *The Silver Chair*

76. Is this a generic situation or an exception?
77. Is this something that underlies a great many occurrences?
78. Can this generic situation be answered through a rule or principal?
79. What are the objectives and goals of the decision?

80. What are the conditions it must satisfy?
81. Are we doing what is right, or what is acceptable?
82. Are there any consequences that we should consider before we decide?
83. Who has to know of this decision?
84. What action has to be taken?
85. Who has to take it?
86. What does the action have to be so that the people who have to do it can do it?
87. What must we know to test the validity of this hypothesis?
88. What happens if we do nothing?
89. Does this decision “feel” right?

Time Management

*“How did it get so late so
soon?”*

— Dr. Seuss

90. What can be eliminated?
91. What can be delegated?
92. How can we make our meetings more efficient?
93. Do we follow a stated agenda?
94. Can we combine or eliminate meetings?

Communication

*“The single biggest
problem in
communication is the
illusion that it has taken
place.”*

— *George Bernard Shaw*

95. What are our emotions telling us to do?
96. Where are emotions clouding judgement?
97. What is our reasoning telling us to do?
98. Where is reason ignoring important cues from emotions?
99. Is this communication within the range of this person's perception?
100. Will they receive the communication?
101. If I were this person ...?
102. What would it look like if?
103. What would you do if... ?
104. What would that be like?

105. What would that feel like?
106. How could that be accomplished?
107. How could you make that happen?
108. Who would benefit?
109. Who would be affected the most?
110. When could that happen?
111. What can I do differently in this situation?
112. Do I want to be right, or do I want resolution?

Questioning others

113. Does the person give, take, or match?
114. Do they honor space, reciprocate, and collaborate?
115. Will they take over conversation or share it?
116. Will they be friendly or harmful?
117. Can we trust them?
118. What do they think, what do they want to talk about, what's on their minds?
119. What does success mean to them?

Including Others

120. To what extent and in what ways are we fostering a vision for and a climate of including others in the conversation?
121. To what extent are we inviting members to participate in defining the organization's vision and shared values?

Appreciation

122. Are conversations appreciative?
123. To what extent and in what ways are we setting the tone of respect, honor, and appreciation?
124. In what ways are we fostering an environment that nurtures supportive, cooperative relationships through sincerity, caring, and openness?

Aspirational

125. Are conversations aspirational?
126. To what extent and in what ways are we helping each other embrace the future rather than fear it?
127. How do we help others connect team and organizational expectations and objectives with their own aspirations, passions, and goals?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

128. How are we expanding each other's sense of what is possible for themselves and the team?

Sharing

129. Do conversations encourage collaborations and sharing?
130. To what extent and in what ways are we setting the tone for cross functional affiliations?
131. When, where, and how are colleagues invited to exchange best practices, share information, and reduce defensiveness?
132. How are we helping to break down silos and exploring unfamiliar areas within and outside the group?

Forward Thinking

133. Do conversations foster next-generation thinking?
134. To what extent and in what ways are we helping each other move from

- being attached to the past and old habits to focusing on breakthrough ideas, innovations, and strategies?
135. How are we promoting imagination, creativity, innovation, and productive thinking for growth within and with outside partners and customers?

Open Dialogue

136. Do conversations communicate that everyone's voice counts?
137. To what extent and in what ways are we working to develop the next generation of leaders?
138. How are we cultivating an environment where people nurture and communicate their own judgement and perspectives in their own unique voices?
139. In what ways are we empowering people to challenge authority and avoid forced consensus or groupthink?

140. How are we sparking each other's leadership instincts and wisdom so everyone can contribute to the growth of the organization?

Harmonizing

141. Do conversations celebrate success?
142. To what extent and in what ways are we setting the tone for courage, celebration, and reinvention, helping people move from the singular focus of making numbers or achieving tasks to seeking a higher mission and purpose?
143. In what ways are people being intellectually nourished – and nourishing others – while contributing to the ongoing progress of the organization?
144. How are we helping the organization achieve the next level of excellence?

Branding

“A brand for a company is like a reputation for a person. You earn reputation by trying to do hard things well.”

— Jeff Bezos

Message

145. How are we differentiating from our competitors?
146. Does our visual identity have any meaning?
147. How did we select our brand touchpoints?
148. What value are we seeking to create beyond profits?

Values

149. What are our brand's priorities?
150. What ethical lines are we unwilling to cross?
151. What inspires and drives our brand?
152. What principles will keep us on track in a crisis?
153. Do any of our answers overlap?

Know your Customer

154. Which person needs this product?
155. What are they really buying?
156. What are their wants, needs, and desires?
157. What segment of this market is necessary to target to achieve our objectives?
158. What type of people (age, sex, income, marital status, number of children, work status) should we be directing our message?
159. What price, practical and emotional pain points do they face?

160. How does their problem make them feel?

Positioning Statement

161. Who is our target customer (segment)?
162. Which of our customer's aspirations will our brand enhance?
163. What can we offer to fulfill our target's needs and wants that competitors can't or haven't put a stake in the ground for? (Remember, this should be emotional, not functional)
164. Who is our main competitor?
165. What makes us different from this competitor?
166. What will make our target customer be most compelled to buy from us?

Employee Evaluations

“If you need to conceal your true nature to get in the door, understand that you’ll probably have to conceal your true nature to keep that job.”

*— Seth Godin, Linchpin:
Are You Indispensable?*

- 167. Are they a good teammate?
- 168. How well does they connect with external customers?
- 169. Do they contribute to targeted profitability levels?
- 170. Can we hire someone for less to do the same work?
- 171. Have their responsibilities and skills increased?

Obstacles

*“Often it isn't the
mountains ahead that
wear you out, it's the little
pebble in your shoe.”*

— *Muhammad Ali*

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

Contrarian Thinking

*“One is fruitful only at
the cost of being rich in
contradictions.”*

— *Friedrich Nietzsche,
Twilight of the Idols*

172. Is the work we do necessary?
173. Is there any way to do what we do better, faster, cheaper?
174. How can we reduce quality and lower productivity?
175. Are we experiencing any psychological biases or fallacies?
176. Can we draw different conclusions from the same information?
177. Are we in a streak?
178. Are we exaggerating our abilities in any area?
179. Are we over-optimistic?

180. Are we ignoring negative or unpleasant information?
181. Have we stopped asking questions?
182. Are our forecasts and plans unrealistically close to “best case” scenarios?
183. Are we comfortable?
184. Do we prefer the Status Quo?
185. Are we avoiding the pain of cutting losses?
186. Are we thinking too short term?
187. Are we explaining away contradictory information or data?

Goals

*“Far away there in the
sunshine are my highest
aspirations. I may not
reach them, but I can
look up and see their
beauty, believe in them,
and try to follow where
they lead.”*

— *Louisa May Alcott*

188. How could this plan fail?
189. Why have we been unable to achieve this goal?
190. Where is the weakest link?
191. Who has a vested interest in killing this?
192. What is the biggest threat to success?
193. Which goal are we most likely to miss?

Plan Analysis

*“It does not do to leave a
live dragon out of your
calculations, if you live
near him.”*

— J.R.R. Tolkien, *The
Hobbit*

194. What are the issues and the conclusions?
195. What are the reasons the plan will be successful?
196. Which words or phrases are ambiguous?
197. What are the value conflicts and assumptions?
198. What are the descriptive assumptions?
199. Are there any fallacies in the reasoning?
200. How strong is the evidence?
201. Are there rival causes?

202. Are the statistics deceptive?
203. What significant information is omitted?
204. What reasonable conclusions are possible?

Argument Dissection

*“It is not necessary to
understand things in order
to argue about them.”*

— *Pierre Beaumarchais*

205. Does this argument address the real problem?
206. What is the point of view of the person or group making the argument?
207. Does the argument include any vague or ambiguous words or loaded language?
208. Does the argument include any value conflicts?
209. Does the argument include any descriptive assumptions – how things are?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

210. Does the argument include any prescriptive assumptions – how things should be?
211. Are there hints of bias?
212. Does the argument include any logical fallacies?
213. How good is the evidence used to support the argument?
214. How good are the statistics?
215. Are the statistics in the proper context?
216. What info is missing?
217. Is the argument based on intuition or gut?
218. Are the analogies appropriate for the situation?
219. Are there any rival causes or other plausible hypotheses?
220. Could a different conclusion be drawn from the same evidence?
221. What are the implications of accepting the argument as stated?

Challenging Assumptions

“Your assumptions are your windows on the world. Scrub them off every once in a while, or the light won't come in.”

— Isaac Asimov

- 222. Is this logical?
- 223. Is this accurate?
- 224. Is this based on preconceived notions or biases?
- 225. Is this based on historical comparisons and are they relevant?
- 226. What must happen for this to become true?
- 227. How much confidence do the planners have that this will happen?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

228. If this becomes true, will it remain true under all conditions?
229. If this proves to be untrue, how would that alter the plan?
230. What is the probability of all assumptions occurring giving probability of flawless execution?

Measurements

*“...not everything that
can be counted counts,
and not everything that
counts can be counted”*

— *William Bruce
Cameron*

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

231. What is the ultimate measure of success?

Goals

*“If a man knows not to
which port he sails, no
wind is favorable.”*

— Seneca the Younger

Quantify the goal - Set the target

- 232. How many new customers?
- 233. Increase revenues to what?
- 234. Increase profit margins to what?
- 235. Cut costs by what?
- 236. Consumer satisfaction survey improvement by how much?
- 237. Are our objectives derived from what our business is, what it will be, and what it should be?
- 238. Are our objectives clear, unambiguous, measurable results,

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

have deadlines, with specific assignments of accountability?

239. Is our performance commensurate with our stated objectives?
240. Is our performance commensurate with the market?
241. Is our performance commensurate with our market standing?
242. Is our performance commensurate with our research spending?
243. Is our performance commensurate with the areas of greatest growth opportunities?
244. How many opportunities did we miss?
245. Why did we miss opportunities?
246. Did we not see the opportunities, or did we dismiss them or botched them?
247. How well do we convert innovation into a commercial product?

Profit

*“In business, profitability
is a non-negotiable.”*

— *Hendrih Vanlon
Smith Jr, CEO of
Mayflower-Plymouth*

- 248. What is our Gross Margin?
- 249. What is our EBITDA?
- 250. What is our breakeven point?
- 251. What are our sales per employee?
- 252. What is our profit per employee?
- 253. What is our Return on Assets?
- 254. What is our Days Payables
Outstanding?
- 255. What is our Days Receivables
Outstanding?
- 256. What is our Inventory Turnover
Ratio?
- 257. What is our 1 and 3-month cash flow
forecast?

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

258. What is our 1 year and 3-year performance forecast?

Why Businesses Fail

A sufficient amount of researching, planning, organizing, celebrating, debating, restructuring, and crying are necessary in managing successful companies in addition to **access to capital and talent** which are the two most important features.

You won't get far very fast without access to capital. You may get some traction with lackluster talent, but it won't be sustainable, and you won't realize your intended growth trajectory until you fill the seats with real and relevant talent.

Startups fail due to many factors. Missteps can typically be identified early in the process. These missteps could oftentimes have been avoided had the founders asked a few relevant questions such as what is found in this resource and the following:

- Is there a market for our products?

- Can we effectively compete with existing competition?
- What is our value proposition?
- Can we secure sufficient funding to get us to the next phase?

That last one on funding gets most founders, even me just a few years back.

The vastness of a founder's optimism is only exceeded by their willingness to take financial and relationship risks. Both of which I applaud and respect.

However, optimism and perilous risk taking won't sustain a company for long.

Mediocre talent will bring mediocre funding, mediocre hiring, and mediocre success. Low talent founders will bring a corresponding level of each.

In startups as well as established enterprises, a lack of talented leadership will typically be evident and an investment in the company can be easily avoided. However, spotting mediocre talent is much more difficult, especially if the founder or executives are well connected.

Well-connected mediocre leaders can often sustain funding to enable their organization to successfully compete, for a while, without implementing certain measures to increase talent, efficiencies, and profitability.

However, without talented leadership that is consistently questioning their own and the company's purpose, product, competition, and every layer of the organization, it will not last and will be a poor long-term investment.

These are lazy companies that may have gotten lucky, caught a trend, or surrendered to comfort. Companies today cannot stop innovating. If they

aren't growing, they are dying. It's as simple as that. If the lazy behavior is not corrected, these companies go out of business or are acquired by a better managed competitor or PE firm that has recognized the lack of effective management in a way that, once improved, will provide significant gains to their investors.

All of this can be avoided by asking the questions in this resource. Using this, along with other excellent resources written by talented business leaders, consultants, advisors, and successful founders, you have no reason to be unsuccessful in your organizational aspirations...that is unless you are lazy, unprepared, or too caught up in the day to day to focus on real progress.

Do the work.

Always be asking.

Realize your company's vision.

About the Author

Michael spends his time leading teams, family offices, investors, and global companies on strategy & capital management initiatives. He spends his waking hours shaping innovative approaches to solving complex issues.

He has honed his ability to identify the driving factors of highly successful companies. Further research and experience allowed him to develop the ability to transform existing businesses into the great company the founders originally envisioned.

With this experience he consulted with companies producing billions of dollars in sales and managing tens of billions of dollars in physical and

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee

financial assets.

He finds the greatest rewards in helping organizations grow & find Strategy Clarity; whether that entails building effective teams, evaluating efficiencies, raising capital, project analysis, lending and credit, developing a capital allocation strategy, or technology enablement. He believes in a leader's intuition but also in working with advisors/boards/team members to unlock the value of big data with predictive analytics to support business decisions.

He has worked with diverse & dynamic teams across a range of clients (global businesses, institutions, family offices, UHNW investors). He is intrigued by effective leadership, applauds inclusion & collaboration, and never tries to underestimate the power of purpose.

He is a thought leader on the global

megatrends that are shaping future paths for business & society. He enjoys applying emerging trends to create opportunities and exceed client objectives.

The driving purpose for all he does is to connect with people who have the desire, energy, resources, and share his passion for a better future for others, society, environment, and the world.

Outside of family, other big passions for him include economic development and volunteering his remaining time with various local and international organizations whose mission is to improve this world for all.

He is highly-driven to create a bright future for people, clients & economy and is also an avid adventure motorcyclist with a mission to #RideTheWorld.

@_michaeljlee  /michaeljlee-cfa 
_MichaelJLee