



Goals & Questions

MONEY REFLECTION

1. If money were not a concern, what would I like to accomplish? Why is this important to me?
2. If I had money to give away, who or what organization would I help? Why?

SELF REFLECTION

3. Of the things I have done, which have brought me the greatest joy? What would I do more of if I had the time?

FORWARD LOOKING

4. What do I need from a financial advisor at this time?
5. Over the next three years, what would make me feel good about my progress regarding money, profession, family or other areas of my life?

