

CREATE YOUR IDEAL LIFE EXPERIENCE HERE

The purpose of these questions is to stimulate your thinking about the future you wish to create. It is not a substitute for an actual financial needs analysis and should never be used as a replacement for one.

It forms a great starting point for discussion with our team, as it is based on possibilities instead of problems. Feel free to forward us your responses or bring them to our first meeting as they will form the foundation for a productive time together!

Here are some questions to get you thinking about the life experience you want to create.

How do I envision success? (Define your values, payoffs, and motivations).

How do I want to serve others and society? (Consider whether it's important for you to be in an occupation that adds value to others or makes a contribution to society).

What types of clients and friends do I want to have? (Describe relationships, values, ideas and entertainment).

What type of house(s) do I want to own? (Think about self-expression, comfort, convenience, and beauty).

Where do I want to live? (Visualize the community, your status, life experience, friends and beliefs).

How many weeks of vacation do I want to take each year? (Consider things such as adventure and family bonding).

Where do I want to go on my vacations? (Picture fun, beauty, and adventure).

How many hours do I want to work each week? (Think about balance, recharging yourself, and personal growth).

What do I want to do when I'm not working? (List hobbies and other interests).

Where do I want my children to go to school? (Address, parental values and desired child experiences).

How much net income will I need to support my ideal life experience? (List your ideal compensation range).

At what age do I want work to become optional? (Visualize leisure activities).

How much money will I need to retire comfortably? (Evaluate financial independence).

How much money will I need to invest each year to achieve my retirement goals? (Describe money habits).

Where do I want to live when I retire? (Consider weather and beauty).

What do I want to do with my time when I retire? (Think about health, vitality and fun).

What type of friendships do I want to have? (What is the ideal relationship to have with friends?)

What do I want to do to keep healthy? (Describe your ideal exercise program and the time it will take).

What type of legacy do I want to leave for my family and my favorite causes when I die? (Describe meaning, purpose and mission, charitable giving).

What type of role model do I want to be for my children and my friends?

It's a good idea to go over these questions with your spouse or someone else close to you. If you turn your responses to these questions into goals, these goals will become an emotional lighthouse for you. If they're truly inspiring, they'll keep you focused and motivated. They are the foundation for your definition of a wonderful life, the true purpose of building a focussed financial plan.