

My Vision of the Future



- How I visualize my life in my 60's 70's and 80's:
- How I plan to change my lifestyle (if at all) if I retire:
- If I intend to retire, what will I miss most about the job I currently have:
- My biggest fears about the future:
- What I most look forward to about the future:
- The top things I would like to accomplish/experience in my lifetime:

Interior Questions

1. Tell me about your family when you were growing up
2. Was money discussed at the dinner table?
3. What messages, direct or indirect, did you receive from you mother regarding money?
4. What messages did you receive from your father?
5. What messages did your grandparents/other family members?

Interior Questions Continued . . .

6. Were there family stories about money?
7. Describe your parents' financial history
8. What financial values and/or discussions with your parents continue to affect you today?
9. What would you like to do differently from your parents regarding money? What would you like to do the same?
10. What financial expectations did your parents and grandparents have of you?

Interior Questions Continued . . .

11. How much control did you have over money you made or received as gifts?
12. What is your first memory about money?
13. What was learned from that experience?
14. Describe a joyful memory about money.
15. Describe a painful memory about money?

Interior Questions Continued . . .

16. Describe your work history.
17. What were some of the best financial decisions you have made in the past?
18. What were some of the financial decisions you have made in the past that you regret?
19. What does money mean to you?
20. What is important about money to you?