

# QUESTIONS FOR LIFE ISSUES

1. When was the last time someone, not involved in your planning, gave you a second opinion as to whether or not you have covered all the bases?
2. What do you want to accomplish with your life? Why are you here? What is your purpose?
3. What does financial security mean to you?
4. What does financial freedom mean to you?
5. What do you want to accomplish with your money?
6. What is your family financial philosophy?
7. What's important about money to you?
8. What is your overall financial and investment strategy or game plan?
9. What are your goals?
10. What is your exit strategy?
11. Where do you want your money to go?
12. How do you want to be remembered by your children, your grandchildren, your favorite charities, your community and society?
13. What would you like your ideal calendar to look like in five years?
14. If you knew with virtual certainty that you were going to die within the next six months, what changes would you make in your life and in your planning?
15. What changes would you like to make in your overall financial situation?
16. How do you feel about the income-tax system in this country?
17. How do you feel about estate taxes and related costs?
18. What have you done to protect your assets from divorce, bankruptcy or creditors of your children?