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WEALTH MANAGEMENT

CLARITY. INSIGHT. PARTNERSHIP.

Redefining what a wealth manager does.

What is your first joyful memory of money?

What is your first painful memory of money?

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Question #1

I want you to imagine that you are financially secure, that you have enough money to take care of your needs, now and in the future. The question is... how would you live your life? Would you change anything? Let yourself go. Don't hold back on your dreams.

Describe a life that is complete, that is richly yours.

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Question # 2

This time you visit your doctor who tells you that you have only 5 – 10 years left to live. The good part is that you won't ever feel sick. The bad news is that you will have no notice of the moment of your death. What will you do in the time you have remaining to live?

Will you change your life and how will you do it?

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Question #3

This time your doctor shocks you with the news that you have only one day left to live. Notice what feelings arise as you confront your very real mortality.

Ask yourself:

What did I miss?

Who did I not get to be?

What did I not get to do?

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Goals For Your Life

	1 MONTH	3 MONTHS	1 YEAR	3 YEARS	5 YEARS	10 YEARS	20 YEARS	LIFETIME
WORK								
FAMILY								
RELATIONSHIP								
SPIRIT								
COMMUNITY								
CREATIVITY								
HEALTH								

INSTRUCTION: (1) Put in your own categories in any of the blank rows. Feel free to delete or modify any of the first six categories. (2) You do not need to fill in all the cells in the table. It is best to fill in at least eight cells. (3) Each cell represents a goal that you wish to complete by the end of the timeline specified at the top of the column. (4) As you scan the blank table, move towards whatever cell "calls out" to you, and fill in a goal for that box. Put the number 1 in the corner of that box, to denote it as your first priority. Then move towards another cell that calls out to you, and fill it in with a goal, putting the number 2 in its corner. Continue in this fashion until you have completed eight or more cells. (5) Remember: this exercise is a more intuitive than rational process. Whatever goals call out to you are "the right goals." Do not try to make the collection of goals fit into a coherent pattern.

EVOKE[®]
The 5 Phase Life Planning Process

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INSTRUCTIONS:

please fill out this grid with the boxes that call out to you. You can fill out all the boxes but are not obligated to. Columns/ rows: hearts core: meaning to have, do and be closest to your heart. Ought to: meaning what you feel obligated to have, do or be. Fun to have, do or be, wouldn't feel obligated to like "ought to" or passion like "hearts core" rather fun things. Have: tends to be possessions/things. Do: tends to be actions. Be tends to be qualities. But there are no wrong answers. You may or not have repeat from the other sections, this is ok.

	HEART'S CORE	OUGHT TO	FUN TO
HAVE			
DO			
BE			

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INSTRUCTIONS:

List out your historical investing experience, from your first day of investing to the present.

Ex. Your personal experiences with investing or your experiences working with a financial professional.