



Life Planning Exercise

Instruction: make sure this sheet is printed out and *put pencil/pen to paper*. There is something about the process of thinking and writing answers down -- you'll just have to trust me.

While the title may seem like a silly cliché, or possibly an uncomfortable procedure to think about, try to take three minutes on each question. It's only three questions -- and nine minutes! Money is simply a conduit for the goals, drive and aspiration of our lives so it is crucial to understand how it all ties together in each of our lives.

Tip: try to get *detailed* and be *honest*. You may not only learn something about yourself, but specifics make financial planning a more straightforward process. Taking these questions to heart and letting them drive decisions moving forward may provide some drastic clarity in your financial life.

A promise: there's no judging here and no need to augment or filter your answers. I don't need to read them word-for-word, so long as we can discuss the heart of the responses.

1) If you had all the money you needed, how would you live or change your life?

2) If you suddenly discovered you only had 5-10 years left to live, what would you do differently with your life?

3) If you go to the doctor and they say you only have 24 hours left to live, taking you totally by surprise, what did you miss? Who did you not get to be? What did you not get to do?