

# Financial Planning Questionnaire

## Uncovering Your **WHY**

### Goals Section: Uncovering What Truly Matters

- "If you could design the perfect retirement, what would an ideal day look like from morning to night?"

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- "Imagine you're 85, looking back at your retirement—what would make you feel like you truly lived well?"

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- "What experiences or opportunities do you want your money to provide for you and your family?"

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- "If you had unlimited resources, how would you spend your time differently in retirement?"

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- "What's something non-financial that's just as important as money when thinking about retirement?"

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- "Tell me about your relationship with money"

- "do you think any of these important values were passed on to you from your parents?"

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- “are there any money lessons you think they passed onto you?”  
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- “are there any important values you hope your kids inherit from you?”  
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### Retirement Expectations & Concerns: Preparing for the Unknown

- **"What keeps you up at night when thinking about retirement?"**  
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- **"If the markets dropped 40% tomorrow, what would be your first instinct?"**  
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- **"What's one thing you've seen others struggle with in retirement that you want to avoid?"**  
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- **"Which do you worry about more—outliving your money or not enjoying it enough?"**  
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- **"What would financial confidence in retirement look like for you?"**  
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- "How do you see your lifestyle changing in your 70s, 80s, or even 90s?"

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- "If something unexpected happened to your health or your spouse's health, how prepared do you feel?"

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## Understanding What Truly Matters

- "What do you absolutely want to be able to spend on without hesitation in retirement?"

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- "What's more important: protecting what you have or growing your wealth faster?"

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