

You’re Life and Your Money **Financial Planning Supplement**

These questions are designed to get you thinking (and praying) about a variety of subjects. Answers to some of these questions may come easily to you. Others may require some thought and prayer (and, if married, discussion with spouse). Other questions may not hit your nail on the head at all - skip them. Attach separate page(s), if needed.

Foundation:

- Who are the most important people in life to you? (list by name) _____

- What is important about money to you? _____

- Where are you in your financial life right now? (describe this however it makes sense to you)

- How do you feel about where you are financially? _____

Passions:

- Do you have a sense of what God wants to do with your life? (In what ways is God nudging you? What flows naturally from your background or talents? For what has God prepared you?) _____

- Are there certain “people groups” for which God has given you a passion for evangelism, mercy or service (the hungry, children, edifying the saved, prisoners, etc)? _____

- What are the “desires of your heart?” (Psalm 37:4) _____

Passions (cont.):

- What stirs passion (zeal, anger, excitement) in you? _____

- If a large foundation appointed you to give away one million dollars, to which types of causes or organizations would you give? _____
- For which organizations, if any, have you done volunteer work in the past year? _____

Vision:

- What if you had all the money you need for the rest of your life? You're not filthy rich but you have all you'll need. What would you do differently with your life? _____

- Do you sense God's vision for your finances? _____

- Would you do anything differently in your life if you knew you could not fail? _____

- Say you discover that you have only five or ten years to live. You'll be healthy for those years, but death can come at any time after the fifth year. What would you do with your life? _____

Your Philosophies:

Notes: These questions are designed to ask about *you* and your money, not how you think or hope *everyone else* should be. These questions ask about your *philosophies*, your specific *goals* are covered in the next section.

- Do you have a personal philosophy about accumulating money and assets? (How much is appropriate? How much is selfish? Etc.?)

Your Philosophies (cont.):

- Do you have any concern about where your investment dollars ultimately end up? (What kinds of companies they are supporting?) _____

- Do you have a personal philosophy about debt (when and how should you use it, etc.)?

- Do you have a personal philosophy about giving of your money to fund God’s work? (Is “tithing” an upper goal or a starting point, etc.?) _____

- Do you have a personal philosophy about retirement? _____

- Do you have a personal philosophy about your lifestyle? (Is it wrong to live “high on the hog?” How do you balance enjoying the material blessings that God makes available to you and sharing your resources with those in dire need? Etc.?) _____

- Do you have a personal philosophy about the disposition of your assets after you have died? (Does your family have a moral right to these assets? Should any go to charity? Etc)? _____

Goals:

- What is your most important personal goal? _____

- What other non-financial goals do you have? _____

Goals (cont):

- List any goals you have for specific financial issues? (Possible issues include retirement, education, giving, insurance, investments, estate plan, debt, insurance, cash on hand, lifestyle, major purchases, caring for parents, business issues, etc. Do not feel compelled to have goals for each issue. Only list those goals that are important to you.)

- What are your goals and dreams for your children or grandchildren? _____

Your Work:

- Do you feel your occupation is in line with God's call in your life? _____

- Do you feel that you have balance in your work and leisure? If you are married, does your spouse agree with your answer? _____

- Do you receive a sense of satisfaction from your work? _____

Concerns:

- Financially, what do you worry about? _____

- What factors are you afraid may adversely affect your financial future? _____

- What do you like most/least about your current financial situation? _____

- In what area(s) is your financial life more complicated than you would like? _____

- Do you have concerns about how your heirs may use money or possessions you leave them?

Concerns (cont):

- There are three ways to utilize your money: Spend, Save, and Give. Do you feel you are allocating too *little* money, or too *much* money, to any of these three areas? Describe: _____

- Do you feel you have any specific “barriers” that are preventing you from using your money in the best possible ways (over-spending, too much debt, erratic income, different goals than spouse, fear of loss, etc.)? _____

Miscellaneous:

- Are you willing to make changes in your life now, if necessary, to achieve your personal & financial goals? _____

- Do you enjoy being a “student” of money and learning the nuances of financial issues? _____

- Do you have any philosophical or religious views or moral convictions that should be kept in mind during our planning together? _____

- Should a Christian perspective be used in our planning? _____

Final Assessment:

- You’re told you have only 24 hours to live. What did you miss? Who did you not get to be? _____

- Do you have a “Life Mission Statement”? If so, please share it with us: _____

- What else do you want us to know about you? _____
