

4. List 5 things that you want and already have

5. List 5 things that you want and do not already have

6. Describe to me your childhood – how was your family around money, how did you learn about money? What was it like?

7. How do you want to spend your leisure time?

8. How do you want to spend your social time and family time?

9. What do you want your career path to look like?

10. Finish these sentences:

a. Money is

b. Money was

c. Money will be

11. On a scale of 0-10 with 0 being “I’m not doing anything” and 10 being “I have accomplished all my goals”, how would you rate yourself?
- a. How would a family member or friend rate you from 0-10 in terms of how you’re doing?
12. Earlier you stated that you were a ___ on the scale, what are you already doing that might in some way contribute to your hopes being met? Why are you rating yourself so highly? (Don’t take this the wrong way)
13. What is something you can do today or this week to move yourself ½ a point up on the scale?
14. (if need help answering action point above) Is there something you have done in the past that might be useful for you now?
- a. If yes – what did you do?
- b. If no – has a family member or friend ever faced an analogous situation? Did they do something that could be useful to you now?

Questions to ask to help prompt client answers:

- Describe your ideal future.
- When would you like to achieve these goals? Be specific.
- How will things change in your life as a result of these goals?
- Identify obstacles
- How important is this goal to you?
- What is one thing you can do better?
- What are a few things you would like to learn about? (doesn't need to be finance related)
- What are some habits you could improve or work on?