



Group Questions



What do you want your financial legacy to be?

What is the primary concern you have about your finances?

Money Goals

1

What does this goal it mean to you

Time Horizon

2

What does this goal it mean to you

Time Horizon

3

What does this goal it mean to you

Time Horizon

4

What does this goal it mean to you

Time Horizon

How do you define financial freedom and success with money?

If you had one extra hour a day, what would you do with it? (You can't sleep or rest)

