LifeGuide Financial Advisors

LifePlanning Exercise #2

What Matters Most

One of the most common financial mistakes people make is failing to align their finances with what matters most to them. This exercise is designed to help you identify and prioritize what's most important to you. Get as specific as possible in this exercise. Try to paint a detailed picture with your answers. While this exercise may be a bit challenging, many of our clients find it to be a meaningful and insightful experience. So try to take some time to really reflect on the questions and avoid the temptation to rush through them.

Once complete, please email a copy to your advisor.

Question #1:

Imagine you are financially secure and have all the money you need for the rest of your life to do whatever it is that you want to do. What would you change about your life?

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Question #2:

Next, imagine you visit your doctor and she informs you that you only have 5–10 years left to live, but you won't ever feel sick. What would you have to do in the years you have remaining? What would become urgent to you?

Question #3:

Finally, imagine your doctor tells you that you only have one day left to live. What would be lost? What did you not get to bring into the world that you still want to?

Note: This question isn't about how you'd spend your last day or what loose ends you would tie up. Rather, it's a reflection on the hopes and dreams you weren't able to accomplish.