



Defining True Wealth

Client Name _____

Date _____

Directions: The purpose of this worksheet is to clarify what is most important to you. This awareness, in turn, will provide an effective framework for creating plans and making important life decisions. Please take a few minutes to reflect on each question and give thoughtful consideration to your responses.

1. How do you define success in your working life?

2. How do you define success in your family life?

3. How do you define success in your financial life?

4. How do you define balance in your life?

5. How do you hope to be remembered someday?