

Thinking about the purpose for your wealth?

Here are some questions you might ponder...

- Imagine you're retired and financially-secure. It's a Tuesday morning at 8am...
 - ◆ Where are you geographically?
 - ◆ Who is with you?
 - ◆ What things are you doing today?

- What are the three biggest sources of joy in your life right now?

- What are your three biggest worries right now?

- Five or 10 years from now, what would you like to have accomplished?

- What do you think your biggest concerns or challenges will be 10 years from now?

- If you had more wealth, how would your life be different?

- How important is leaving a financial legacy to heirs?

- How important is leaving a financial legacy to charity?

- What does your wealth allow you to do today?
What do you want it to help you do in the future?

This is certainly not an exhaustive list, but something to help you start thinking about what it's for.



5060 North 40th Street, Suite 200
Phoenix, AZ 85018
(602) 466-2611

www.TFOphoenix.com

