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.