



**Directions:** Print out this document and use it to envision your ideal life. You can fill in the boxes in any order. Don't feel like you have to fill in every box, however, you should strive for at least 12 boxes filled in. These goals may be money related, but don't necessarily have to be financial.

	<b>3 months</b>	<b>6 months</b>	<b>1 year</b>	<b>3 years</b>	<b>10 years</b>	<b>Lifetime</b>
<b>Family (however you define family)</b>						
<b>Self</b>						
<b>Professional</b>						
<b>Community</b>						
<b>Other:</b>  _____						



**Directions:** Imagine that you are completely financially secure. You have enough money to meet your immediate needs as well as all you anticipate having in the future. Money is not a constraint. How would you live your life? What would you do each day? Is there anything that you would change? Use the space below to describe your ideal life.



## Communication Preferences Questionnaire

Everyone has a preferred style of communicating when we talk about major life decisions. Finance related discussions are more productive and less emotional when we know one another's communication styles. The following exercise is designed to allow you to quickly identify your primary communication preferences, and for me to use this knowledge to try to tailor my advice in a way that works best for you.

**Directions:** From the list below, circle the 5 preferences that most apply to you.

Encourage my input.	Be an active listener	Remember my need for control.
Give direct answers; get right to the point.	Offer multiple options so I can decide	Tell me who is involved.
Allow me time to process my response.	Use summaries and key points.	Soften the tone of communication.
Move quickly to the bottom line.	Look for ways to minimize risks.	Remember my need to analyze and use numbers to come to a decision.
Use graphics and illustrations to help me digest information.	Invest time in building our relationship.	Do not mistake my lack of response for inattention.

Now that you have 5, go back and cross off the 2 of those 5 that are least important. You should be left with just 3 preferences. Fill them in here, in order of which one is most important to you.

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_