



Balance:
Wealth Planning

Your vision and goals

Question one



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Imagine that you are financially secure and have all the money you need for the rest of your life.
How would you live your life? Would you change anything? What would you do?

Question two



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This time you visit your doctor who tells you that you have only 5 – 10 years left to live.

The good news is that you won't ever feel ill. The bad news is that you will have no notice of the moment of your death.

What will you do in the years you have remaining?

Will you change your life? How will you do it?

Question three



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This time your doctor shocks you with the news that you have only one day left to live.

Notice what feelings arise as you confront your very real mortality. Reflecting on your life, on all your accomplishments as well as on all the things that will remain undone, ask yourself:

What did I miss?

Who did I not get to be?

What did I not get to do?