

# Wealth Vision Worksheet

## **Self-reflection**

**What does wealth mean to you?**

*(Examples: Security, freedom, opportunity for education, ability to give back)*

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**How does wealth align with your life values?**

*(Examples: Supporting family, contributing to community, pursuing personal growth)*

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## **Family impact**

**How do you want your wealth to influence your children's and grandchildren's lives?**

*(Examples: Fund their education, enable travel experiences, teach philanthropy)*

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**How will you avoid negative effects like entitlement?**

*(Examples: Setting spending limits, encouraging part-time jobs, volunteering as a family)*

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## **Partner and family alignment**

**What financial goals do you and your partner share?**

*(Examples: Saving for retirement, buying vacation properties, traveling, funding education)*

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**Where do you have different views, and how can you address them?**

*(Examples: Differing views on investments, charitable giving, or savings strategies)*

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