



STERLING WEALTH ADVISORS

www.sterlingwealthadvisors.com

THE QUESTIONS

- What are your top five 3 year goals?
- If we were to meet 3 years from today... what has to have happened during that 3 year period for you to feel happy about your progress?
- What transitions do you anticipate facing in the next 5 years?
(Transitions Survey)
- If you could make *one* change in your life – and were told you *could not* fail, what would you do?
- What would your ideal week in retirement look like? (Worksheet)
- If you were diagnosed with a terminal illness and didn't know how long you had to live, what would you want to do with your life? Your time?
- If you were told you would die tomorrow, what would be your biggest regret?
- What tangibles and *intangibles* do you hope to purchase with your money?
- What does the term "*Financial Independence*" mean to you?
- What keeps you up at night? How would having "*more money*" solve this – would it?
- Why are you seeking financial advice? Why do you want money?