

# PRIORITY SURVEY

Most plans start with money. Ours starts with your life. Take 10 to 15 minutes to share where you are today and where you want to go. We'll build our first conversation around it.

If you are completing this as a couple, each person should fill out a separate copy. Your answers don't need to match. The differences are often as valuable as the common ground.

Your name:

Date:

## PART ONE: WHAT MATTERS, AND WHERE YOU STAND TODAY

For each area, rate how important it is to you on a 1-10 scale, then rate where things stand today. The gap between those two numbers is where we'll begin.

| LIFE AREA                      | IMPORTANCE (1-10) | TODAY (1-10) |
|--------------------------------|-------------------|--------------|
| Health & Wellbeing             |                   |              |
| Family & Relationships         |                   |              |
| Friendships & Community        |                   |              |
| Experiences & Adventure        |                   |              |
| Career & Purpose               |                   |              |
| Financial Clarity & Confidence |                   |              |
| Impact & Legacy                |                   |              |

## PART TWO: A FEW QUESTIONS

*Short answers are perfectly fine. Honest answers are more useful than polished ones.*

**1** If you could change one thing about your life today, what would it be?

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**2** What keeps you up at night?

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**3** What do you want your wealth to make possible for you and the people you love, during your lifetime and beyond?

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*There are no right answers here. The questions that feel hardest to answer are often the ones worth starting with. Bring whatever you have.*

**Thank you. We look forward to the conversation.**

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