

Important Questions

1. What's important about money to you?
2. If money weren't an issue, would you still be at your current job?
3. What money messages did you get when you were growing up?
4. How would your life change if you knew you had two years to live?
5. If you suddenly discovered that you had two days to live, what would be your biggest regret?
6. Assume that we decide to work together. It's a couple of years from now. You're sitting and having a cappuccino with some of your good friends and you say, "when we decided to work with Marin Financial Advisors, to hire them as our financial advisors, that was one of the best decisions that we made because here's what happened":
7. Look over the values listed below. Throw away 10 of them, keep 5 and rank them.

Achievement

Adventure

Aesthetics and culture

Authority/power

Financial

Friendship/love

Health

Independence

Integrity

Philanthropy

Recreation

Service

Spiritual growth

Wisdom

Work



