

**WEALTH REGENERATION AT RETIREMENT
PLANNING FOR A LIFETIME OF LEADERSHIP**

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**Worksheet 4: More Great Questions for the Car
(or Date Night or on a Beach...)**

- What gives you peace of mind?
- What do you want to preserve besides wealth?
- Does your lifestyle reflect your values?
- What are your priorities at this stage in life?
- What is important to you?
- What are your core values?
- What might others say is your claim to fame?
- How much do you want to tell our children about our wealth?
- What do you want most for our children?
- How do you define an appropriate financial inheritance for our children?
- What is your own experience with a financial inheritance? What type of experience do you want our children to have?
- Do you think you have a good plan in place now? If not, why not?
- Is there anything in your present financial plan that frustrates you or is getting in the way?
- How comfortable are you at ceding control to others?
- How much do you want to do at this point in your life?