

“If the ladder is not leaning against the right wall, every step we take just gets us to the wrong place faster.” - Stephen Covey

**Questions to Help You Develop a Financial “Why” Statement**

- › What about money is important to you?

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- › Fast forward 5 years from now... what would need to change for you to feel financially healthy?

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- › Jim Collins 20-10 Test: What would you do if you had \$20 million in the bank? What would you do if you had 10 years left to live?

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## **Sample Statements:**

- › Never be a burden to my kids and leave them an inheritance
- › Share experiences with my family and raise responsible, independent children
- › Give generously and spend time with my family
- › Travel and do missions work
- › Provide security and stability
- › Have a flexible schedule, travel with my family, and be generous with my time/money

**Action Step: write out your own Financial “Why” Statement**