



WEALTH ADVISORS
Serving Your Life & Legacy

So, What's Your Story?

We all come from varying backgrounds, histories, life experiences and educational backgrounds. Who we are is a result of the lifetime of experiences we have lived. No matter what stage of life you are in, your story up to this point has been written and is a big part of who you are and how you view your surroundings and the world we live in. It shapes your expectations for now and into the future.

If you had to stop and take some time to seriously look at your life's story what would you see? What are the pictures you would conjure up, the illustrations that would describe to others what brought you to the place you are at today? If you needed to use some metaphors to describe your life, what would they be?

You are a unique individual with a unique personality, gifts, experiences and even some baggage that is yours alone. Taking some time to develop this story and assess what got you where you are today will help you determine what the next chapters in your story will look like.

When you complete this exercise ask yourself if you are satisfied with what you see for the next chapters in your life story. If so, great! Keep moving forward on your current path. If you believe there are some areas you would like to see come out a little differently, identify them and make notes for yourself to review.

When a financial advisor works with you to help you develop your plans for the future it is critical that they understand your story. The best possible plans will be developed for you as an individual, or a family, if there is a clear understanding of this story and where you want the story to go into the future. That is what a good advisor should be doing for you. They should have a very clear understanding of how you got to where you are in your life and your finances and help you clearly picture what you desire for your future story.

After all, what good is money if you don't have a vision and a purpose for what you want the money to do for you? Money in and of itself is just a utility. It doesn't have real meaning until it can be clearly linked to your story, your goals, your dreams and your vision.

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Schedule a meeting

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