

MY TRUE PURPOSE FOR MONEY



Premier Wealth Advisors, Inc.

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Los Angeles • Miami • Palm Springs • Boston • Las Vegas

HELPING SELECT INDIVIDUALS MAKE SMART FINANCIAL DECISIONS

6200 CANOGA AVE., SUITE 202
WOODLAND HILLS, CA 91367

818-888-4646

Goals & Values

Each of us has our own set of values & beliefs. Your values act as a compass, guiding you to life and career choices that give you meaning. One way to express values is through financial decisions. This is why, no matter what financial decision you are facing the first step is to define your values.

Discovering your True Purpose for Money can pave the way for long lasting satisfaction & fulfillment regarding financial decisions.

Remember:

*Money Does Not Make
People Happy*

Money itself is merely paper, metal, and electronic data.

Throughout the course of life, each of us attaches other meanings associated with money. Some people have a lot of money, yet never find fulfillment, while others with relatively little money are happy, content, and satisfied.

True happiness comes from values being realized in your life relationships, love, excitement, adventure, fulfillment. Money is the tool, and when it is used purposefully, it helps to create the things that are most meaningful and important to you.

Discovering Your True Purpose for Money

One of the main purposes we remain stuck in an unfulfilling cycle is because we continue to ask limiting, short-sighted questions, such as:

How will I make it?
Will I make it?
How can I get ahead?
Why can't I have what they have?

Instead we have the option to ask empowering visionary questions that get straight to the heart of the matter and supersede immediate doubts & fears.

This part of the process requires for you to be introspective. You will need to focus internally to provide answers to these questions. There are two questions:

Question 1: Dickens Question

Question 2: eVALUEate your Goals Question

Question 1

Dicken's Question

If I were at the end of my life, what would have to happen financially for me to be able to say I have lived a life without regrets?

In other words, in the following areas of my life what goals would you want to achieve?

Areas to consider:

<i>Family:</i>	<i>Who is most important?</i>
<i>Charities:</i>	<i>Which one? How much?</i>
<i>Education:</i>	<i>For whom?</i>
<i>Retirement:</i>	<i>When? Standard of living?</i>
<i>Possessions:</i>	<i>Cars? Toys? Jewellery? What else?</i>
<i>Experiences:</i>	<i>Adventures you want to have?</i>
<i>Travel:</i>	<i>Where? How?</i>
<i>Health:</i>	<i>Yours? Family Members?</i>
<i>Property:</i>	<i>Homes? Land?</i>
<i>Interest:</i>	<i>Hobbies or lessons you want to pursue</i>

Goal: An object or end that one strives to attain

What would you like to achieve with your money?

In dollar figures, how much money do you need or want?

When you think about your money, what concerns, needs, or feelings come to mind?

If you didn't have to work anymore, what would you do?

What are your personal goals in the following areas?

Write your answers below:

E.g: Family - I want my spouse to be financially independent and each of my two children to receive \$50,000 in trust.

Personal Goals

Family: _____

Charities: _____

Education: _____

Retirement: _____

Possessions: _____

Experiences: _____

Travel: _____

Health: _____

Interests: _____

Professional Goals

Professional Goals & Business Goals:

eVALUating Your Goals Question

Underlying each and every goal, there is a value - an internal, compelling reason for wanting to accomplish it. They reveal the legacy you want to leave behind. Once you identify the values behind the goals, you can use them to guide you in life's most trying financial decisions.

Value: A persons principles or standards of behavior; ones judgement of what is important in life.

First, determine underlying values.

Look at each goal and honestly evaluate why you want to achieve it.
Why is it important to achieve this?

Value Words

Creativity Success Honesty Vision Security Freedom Adventure
Security Generosity Happiness Beauty Fulfillment Joy Independence
Comfort Honor Kindness Dignity Abundance Respect Faith
Recognition Energy Love Peace Dedication Leadership Family

e.g Family



e.g Security Independence

Choose at least one word for each goal from value words. You may choose more than one.

Family:



Charities:



Education



Retirement



Possessions



Experiences



Travel



Health



Interests



Professional Goals &
Business Goals



Second, Identify three values

Of the values you have written, choose three that personify all values stated and express them. Write those three below.

1.

2.

3.

Third, choose the most important value.

Now, choose one -
the one that could encompass the others. Say it out loud. If it sounds right and feels right, write it down below.
If that's not it, keep trying until you find one.

1.

Crafting Your True Purpose Money Statement

You have united goals and values. Together, they begin to declare your purpose. Now it is time to craft a powerful statement that reflects your goals, your values, and captures your unique personality. This is a declaration that solidifies your values and beliefs into one clearly communicated message. Forming your statement is an important and powerful step.

Guidelines for creating your True Purpose for Money Statement

Begin with "My True Purpose for Money is..."

Utilize the single value word that best expresses your values
(Your answer to the eVALUating your goals question)

Your statement may simply include the opening phrase with your Value word.
(e.g.: "My True Purpose for Money is love OR "My True Purpose for Money is to share love")

. Be selective with the words you use. Strive to have them completely signify your purpose

Speak the statement, write the statement,, and play with the words until you find that it inspires you.

When it's right, you'll know. It will resonate within you, as if you are speaking a truth that you have always known.

Lastly, fill out your powerful purpose statement below.

My True Purpose for Money is...



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