

2013 WPS Retreat in Las Vegas, NV

Session #2: Investing Fundamentals

10:00am – 11:20am



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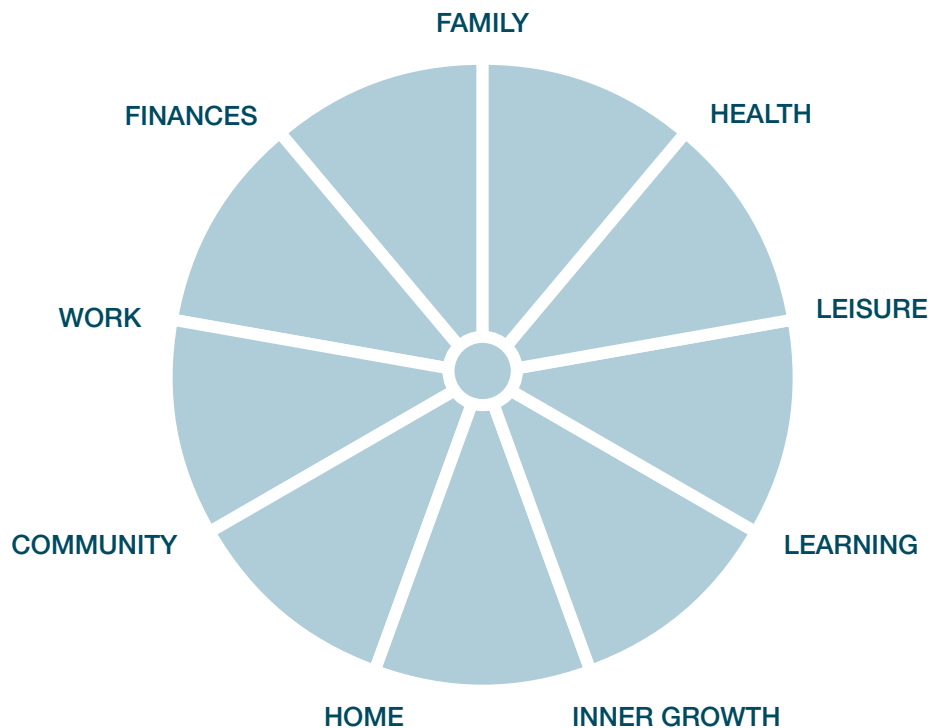
Client Name _____ Date _____

Directions: This exercise will help you to assess your growth and development in each Facet of Life. It will also help you to evaluate the degree of balance and level of life satisfaction you are now experiencing.

Step #1— Place a dot on each spoke that indicates your level of satisfaction in that particular Facet of Life. Use a scale of 0 to 10 with 0 at the hub and 10 at the rim. A zero indicates no satisfaction and a ten indicates the highest degree of satisfaction.

Step #2— Now draw a line to connect the dots and create your life wheel.

Step #3— Is your life wheel round or does it show flat spots? Is it deflated or is it full? What does this exercise tell you about your life? Is your life balanced? Are there areas of your life that need attention? In what facets would you like to experience more satisfaction?





Client Name _____ Date _____

Directions: Gain insight into your current priorities, interests, needs, concerns, and frustrations by completing the following sentences. This information will be important to you as you assess your life balance and plan for your future. Complete the sentences quickly, filling in the blank with the first word or words that come to mind.

If I had more time, I would...

I am the happiest when...

The responsibility I would most like to give up is...

If I had more money, I would...

I feel most frustrated when...

What I value the very most in life is...

I have always wanted to...



Client Name _____ Date _____

Directions: *This is an exercise to help you gain insight into your thoughts and feelings about change. It is also important to consider how you have responded to change in the past and how those attitudes and behaviors might affect your adjustment to life transitions now and in the future. Complete the sentences quickly, filling in the blanks with the first word or words that come to mind.*

In the past, change has been stressful for me when...

A change that was very difficult for me to accept was...

One experience or event that changed my life was when...

One change that I resisted at first, but later appreciated was...

The transition that I am most concerned about is...

The transition I most look forward to is...