

Purpose Driven Planning



Wealth Advice for a Purposeful Life

Securities and advisory services offered through LPL Financial, a registered investment advisor.
Member FINRA/SIPC.



We'd like to personally welcome you to the right half of your brain.

Psychologists say that 94% of all your decisions are made here. Purpose driven, behavioral finance can link your brain with your heart and wallet to provide a dynamically positive impact to the people and causes most important to you.

So far, we've invested time together crafting a personal, working financial plan based on goals, data and relevant information. However, we don't know where these goals come from. We've lived primarily in the left brain, analytical half of who God made you to be. While this is important, God is so much more than that-and so are you. While He's really good with numbers, facts and figures, He's also expanding the universe and everything in it. Most importantly, He created YOU in His image. With a global population of over 7.5 trillion people, there's is no one like you-with the unique gifts, talents and purpose that God has given you to use.

We hope you'll discover a few things about yourself through the following exercise:

A.) First, you were made to be a human being, not a human doing. What you do doesn't necessarily define who you are. Knowing who God made you to be however, will drive what you can passionately do.

B.) Money is like the gasoline in your car. On your journey, it's important not to run out. With this exercise, you'll be focused on where and why you're headed in a certain direction and who it is enriching your journey.

C.) Think of the windshield. It's much bigger, designed for the journey ahead. The rear-view mirror by contrast is much smaller – only to glance back at the past. Focus on enriching your journey ahead.

So, let's get started on the financial road of discovering your deeper purpose and meaning in life. After you've completed this exercise, we'll tie it together with your financial plan and monetize the two together. This is the power and driver of Purpose Driven Planning.

In the following pages, you'll discover the four quadrants of Living, Learning, Giving and Earning. Preface each of them with the question "What does it mean to be really _____?" For example, "What does it mean to be really Living?" and so on. Note on the first page are ten answers in each quadrant captured from previous participants to help get you thinking. Feel free to use some if you want. Take your time, pray and ponder these things as you continue your way through the four quadrants. We've been told that the first two, three, four answers in each quadrant come relatively easy, but eight, nine and ten can be more challenging- which is where we want to be. The remaining pages are designed to expand your thinking and capture your thoughts. After completing the exercise, we recommend you lay it down for a few days. Then pick it up and modify it if needed. You may be surprised at what you discover. We'll follow up in a few weeks.

Until then, enjoy the journey!

Bob

Behavioral Financial Advisor (BFA™)

Chartered Financial Consultant (ChFC®)

Chartered Life Underwriter (CLU®)

Retirement Income Certified Professional (RICP®)

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Top 6 Values


LIVING	LEARNING
<ol style="list-style-type: none"> 1. Invest more in family relationships 2. Strengthen my personal faith walk 3. Do something exhilarating 4. Teach a class 5. Demonstrate ongoing compassion 6. Develop new and lasting friendships 7. Develop/maintain family traditions 8. Commit to regular checkups 9. Volunteer often 10. Travel with a purpose 	<ol style="list-style-type: none"> 1. Discover a new skill or hobby 2. Learn a new language 3. Learn from the wisdom of elders 4. Listen to the next generation 5. Learn a musical instrument 6. Take a series of classes 7. Understand a different culture 8. Become handy 9. Learn and implement healthy food habits 10. Use the power of positive thinking
GIVING	EARNING
<ol style="list-style-type: none"> 1. Be Selfless 2. Loosen your purse strings 3. Be available to someone 4. Lead by serving 5. Develop charitable intent 6. Expect nothing in return 7. Write BOLD checks 8. Be civically minded 9. Buy a stranger's meal 10. Be ready to receive 	<ol style="list-style-type: none"> 1. Hone your gifts, talent & skills 2. Earn a college degree 3. Earn a certification 4. People's Respect 5. Earn interest vs. pay interest 6. Recognition for an accomplishment 7. Honor those in charge 8. Start a new business 9. Invest wisely 10. Earn the right to speak with authority

LIST BELOW 5-7 ACTIVITIES THAT REFLECT EACH SECTION.
SEE NEXT PAGE WITH EXAMPLES TO GET YOU STARTED

WHAT DOES IT MEAN TO BE REALLY:	PURPOSE DRIVEN PLANNING
<p data-bbox="430 373 544 405">LIVING:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p data-bbox="1058 373 1226 405">LEARNING:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p data-bbox="430 1207 544 1239">GIVING:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p data-bbox="1058 1207 1226 1239">EARNING:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

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