



Licciardello Financial Services
Compass Capital Corporation

FIRST MEETING - SAMPLE QUESTIONS

- What lessons about money did you learn when you were young?
- What has been the best decisions you made with respect to money?
- If you could go back, what one financial decision do you wish you could undo?
- If you had all the money you ever needed, how would you live your life?
- If you could have any job, regardless of pay, what would it be? Why?
- If you were told you only have five years left, but would be healthy until the day you died, what would you do with the remaining time?
- What do you value most about money?