



Licciardello Financial Services
Compass Capital Corporation

YOUR VALUES

Some of the questions that may be asked at our first meeting. You don't need to answer these now, but please begin to consider them.

- What lessons about money did you learn when you were young?
- What have 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?