

Identify Transition Objectives **The Glass Door Retreat – Discovery Process**

As you think about these questions, please do not consider for now how exactly these things will be accomplished. For this exercise, it's unimportant.

Be sure not to judge or fool yourself. If you really want a Ferrari, don't put down solving world hunger out of guilt. If something will improve your feeling of self-worth, put it down.



Concepts, phrases or questions are in acknowledgment to:

Bruce Wright, *The Wright Exit Strategy*

Karl Hartey, *Consider, Decide, Act!*

Franco Lombardo, *Life After Wealth*

Timothy Ferriss, *The 4-Hour Workweek*

Bill Bachrach, *Value Based Financial Planning*

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Note: All of your advisors should know what your answers are to the following questions and be working towards helping you achieve your goals. If you answer all of these questions to the best of your ability you'll be able to clearly articulate your position to them.

1. If you had only 10 minutes to live, whom would you call and what would you say?

2. If you had only 12 months to live, how would you choose to live it?

3. If you could do one truly great thing, what would it be?

4. If you could change any list of things in the world, your community and your country, what would they be?

5. If you could wave a magic wand and create the perfect lifestyle or existence for your family, what would it be like?

6. If you would throw away your calendar and replace it with one that took full advantage of your time, talent and resources, what would it look like?

7. What would make you most excited to wake up in the morning to another day?

8. What would you do, day-to-day, if you had \$10 million in the bank?

9. What makes you happiest in your life?

10. What excites you?

11. What do you want more of in your life?

12. What makes you feel accomplished and good about yourself?

13. What are you most proud of having accomplished in your life?

14. What is preventing or delaying you from doing these things that are the best use of your time, talent and resources?

15. How do you feel about your religion?

16. What is the purpose of money?

17. What is important to you about money?

18. When is enough, enough?

19. What are some of the changes you are willing to make to align your life with what is most important to you?

20. How do you feel about your heirs and your desire to support them?

21. What would you like to provide for your heirs while you are alive?

22. What would you like to provide for your heirs after your death?

23. How do you feel about your spouse and their alignment with your objectives?

24. Of your existing advisors, list those whose counsel you respect (friends, spouse, professionals, etc.).

25. Of your existing advisors, who should be included in the decision-making process?

