



# LIFE HISTORY WORKSHEET

Name \_\_\_\_\_

### General Life History:

1. Where are you from?
2. What was your family like while you were growing up?
3. What jobs or careers have you experienced up to this time in your life?
4. What is your family life like now and how would you describe each of your immediate family members?
5. Who are the people in your life that are affected by the financial decisions you make?
6. What are the events that have happened in your life that you would describe as defining moments?

### Financial Life History:

7. What lessons about money did you learn while growing up?
8. What is your first memory around money?
9. What has been the most threatening to your financial security?
10. What are some of the best and worst financial decisions you have ever made?
11. What past experiences with your advisors stand out in your mind and how have these experiences impacted how you work with your advisors now?
12. What have been your main sources of information when making financial decisions?

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