

A Comparison Between Traditional Estate Planning and Purposeful Planning Questions

Traditional Estate Planning Questions

Are typically more technical,
tax-driven

Do you care if your
estate owes taxes
when you die?

My definition of
success is...

What do you want to do with it?

The most important money
value I want to pass on is...

What is it worth today?

I believe that money...

What did you pay for it?

The most difficult thing
about having money is...

The greatest thing
about having money is...

**Purposeful
Planning Questions**
Are more open, values-driven

What do
you have?

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