

Life history has always played a dominant role in shaping individual attitudes. In fact, most individual attitudes and beliefs about money are shaped by childhood experiences.

Life Planning Program

Your Financial Life History

An awareness of your history relating to money will help bring to the forefront any challenges you face in achieving financial well-being. It is these money “messages” that consciously and subconsciously influence how you now deal with money issues. By providing answers to the questions below, we will better understand the roots of your attitudes about money and your actions and patterns in managing it.

Personal history

1. Where are you from? Describe your childhood.

2. What was your family life like when you were growing up?

3. What jobs or careers have you experienced up to this point in your life?

4. What is your family life like now? Describe your immediate family members.

5. Who are the people in your life that are most affected by the financial decisions you make?

6. What events in your life would you describe as defining moments?

Financial life history

1. What lessons about money did you learn while growing up?

2. What is your first memory related to money?

3. What are some of the best or worst financial decisions you have ever made?

4. Have you worked with a financial advisor in the past? If so, describe the experience.

5. If you have not worked with a financial advisor previously, what have your main sources of financial information been?
