



## Finding Your Purpose Statement

In the table below, you will find a number of possible uses to which you could put your current or future wealth. For each one, please check *one* of the three boxes to the right based upon the following definitions:

**Heart’s Core:** *a deeply held core value of yours* as to how the wealth should be used. This is a value you “stand for.”

**Ought To:** something *you feel obligated to do* based on a commitment you may have made or a belief held by your family, someone outside your family, or society in general.

**Fun To:** the “icing on the cake.” Doing this would add zest to your life, *is not an obligation you feel*, and is not truly a deeply held core value, but it sure would be fun!

POSSIBLE USES OF YOUR WEALTH	Heart’s Core	Ought To	Fun To	N/A
Providing for my family’s ongoing needs (Note: this involves day-to-day living expense, mortgage and car payments, vacations, funding children’s education, etc.)				
Supporting parents, siblings, other family members in need				
Providing an inheritance for my children				
Adjusting selected elements of current lifestyle (a second home, a boat, an airplane, traveling, an “expensive hobby,” etc.)				
Supporting a major change in my work and career				
Actualizing a very different direction for my life				
Charitably giving/philanthropy				
Other(s)—please specify				

\*adapted from Roy Dilberto, *Financial Planning—The Next Step* (FPA Press, 2006).