

Legacy Story Prompts to Protect Your Values

Provided by Juetten Personal Financial Planning, LLC and Life Goes on Roadmap®

Ancestors

- Where did your grandparents come from or grow up?
- Do you know what they did for work?
- Where did your parents live when they were raised?
- What did they do for work?
- Did you inherit any part of your work ethic from them? How so?

Growing up

- What was your neighborhood like as a child?
- What was your favorite subject in school? Why?
- Who were your heroes as teenager?
- What was your first real job?
- Why did you choose your college major(s)?
- Did you participate in sports or other activities while in college?

Family & Faith

- How did you meet your better half?
- What common interests do you share?
- What special talents do your children have?
- How did you come to know your faith?
- Has your faith been tested? How so?

Service & Career

- What causes do you support and why?
- Did you serve in the military? When? Where? What branch?
- Who or what inspired you to serve?
- What is your proudest career accomplishment?
- Who or what inspired your career path?

Life Lessons & Values

- How do you measure success in your career?
- How do you measure success in life generally?
- What is one of the best life decisions you ever made?
- What is the best financial decision you ever made?
- What decision would you change if you could?
- What is the greatest gift you've received and by whom?
- What is the most generous gift you have given and to whom?

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