



Passion and Purpose
for Your New Stage

Vision for the Future

A true vision or dream stirs the heart; whether it stems from desire for a particular future or from dissatisfaction with the present it should be evocative and engaging. The vision can guide planning for the future, help people get in touch with what matters most, and inform the financial plan. Vision statements take time to develop and evolve, and questions get the process started.

A 3rd Act Story

Many couples make assumptions about their future retirement plans, but they don't fully share them – if at all! – with their partners. For example, the husband dreams of living on the golf course in Sonoma, while the wife sees herself in a high-rise in Manhattan volunteering at the MET!

Often our clients are so wrapped up in their careers they don't take time to dream and create new possibilities. This visioning exercise uncovers what matters most and can inform both life and financial planning.

Financial Planner Introduction:

Today we are going to have a different conversation that focuses on your life plan. It will help us gather information on what matters most to you and may inform your financial plan. When couples share their vision with each other, they often learn new things and it helps to get on the same page with how your money and your time will be spent in your next stage of life.

Would you be willing to participate in an exercise together? Your answers are for you only. When you have completed the exercise, I will ask you a few questions about the highlights and you are free to share or not share any of this information.

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Instructions:

Ask your clients to complete the vision exercise prior to their meeting with you. It can also be completed in your office for which you should provide a quiet and private space for 15 or 20 minutes. For couples, ask them to complete the exercise individually then share it with each other.

Your 3rd Act Vision Statement

Directions: Fill in as many spaces as you would like and use this to inspire your thinking.

Vision statements take time to evolve. Continue to review and revise it and make it your own.

Example: *I feel joyful. As I sit drinking a glass of wine overlooking the valley, I feel in a wonderful groove. I reflect on a day well spent helping a non-profit to make decisions about how best to use its resources. I have new friends in this organization from every nationality. I have never felt more fit physically or spiritually. My days are full of both activity and quiet. I know I am giving back to my community in a significant way and feel grateful for the opportunity.*

Additional Resources for Visioning:

<https://www.stephencovey.com/sample-mission-statements.php>



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I appreciate ...

and am grateful for ...

A day well spent includes ...

Time flies when I ...

I am looking forward to ...

I feel passionate about ...

My life has meaning and purpose because I am surrounded by people
I love and matter to me including ...

I am growing my social connections through I am living in an
environment that ...

I am caring for myself, body, mind and spirit in these ways ...

I am surprised by ...

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Contact us for more ways The 3rd Act can enhance your relationship with clients, and facilitate the financial planning process:

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