



ThinkingAheadRoadmap.org
A guide for keeping your
money safe as you age

Worksheet: Financial values quiz

Below are several hypothetical decisions you might encounter after your advocate has stepped in to help you. Answering these questions now and discussing your responses with your advocate will help them better understand your financial values and goals, but remember that your needs and circumstances may change as you age.

Scenario 1:

If I had an extra \$500 per month, what would I want my advocate to do with it?

- Donate it to a charity of my choosing
- Use it to help a family member with a worthy cause, like paying school tuition or starting a business
- Buy me something I'd like
- Save it for a rainy day
- Pay down my debt
- Other: _____

Scenario 2:

If my advocate learned that I was planning to use my money on something that seemed risky, like a weekend at the casino or a loan to a friend, what would I want them to do?

- Discourage me from making risky decisions
- Let me use my money however I want unless it will really harm me in the long run
- Let me use my money on risky things up to a certain amount, such as \$: _____
- Other: _____

Scenario 3:

If a close family member was struggling financially and asked me for money that they would likely never pay back, what would I want my financial advocate to do?

- Give them as much as I could afford*
- Give them a smaller amount, such as \$_____*
- Not give them money but instead encourage them to find other ways to get back on their feet
- Other: _____

**Note: If you want your advocate to have the power to make financial gifts on your behalf, you will need to specify this when you set up a financial power of attorney.*

Scenario 4:

If I was approached by a new investment advisor or insurance agent who wanted my business, what would I like my financial advocate to do?

- Discourage me from working with a new financial professional
- Investigate the financial professional's services, fees, other charges, and references before taking action
- Let me invest my money in any way I want, unless it will really harm me in the long run
- Let me invest up to a certain amount, such as \$:_____
- Other: _____

Financial goal:

What financial goals are a top priority for me in the future?

- Spending my savings on myself/my partner while we are alive
- Preserving my savings to leave money for my family
- Setting aside money for charities or causes I care about