

Boomer

Angle™

September , 2015



Living Your Questions

- Paul Norr

People typically come into our office for financial planning advice because of a nagging problem they want to solve. It might be about tax planning, housing issues, investments, long term care, retirement planning, insurance concerns, tax questions or any number of other financial type of worries. Our first priority, of course, is to help them address and manage these concerns.

But there is more to life than simply solving problems. There is more life and more fulfillment. We have the potential to live richer, more complete lives by purposefully focusing on the activities, people and experiences which are most important to us and by building upon our unique strengths. This is living your **best life**.

Planning for your best life.....

Living your best life does not happen by accident. It comes about through intention and effort and planning. Without the intention of a goal towards which to strive or specific dreams to pursue we are much like Alice in Wonderland who asks the Cheshire cat for directions but admits that she doesn't know where she wants to go. The cat rightly replies, **"Then it really doesn't matter which road you choose."**

All of us are like Alice sometimes. The demands of daily life consume our attention. We dissipate our energies with distractions and forget of what really matters. We lose sight of our deepest values, ignore the activities, interests and experiences about which we are passionate and forget the people whom we love, all of the things that truly provides fulfillment.

Good questions are a powerful tool to help keep our lives on track. Engaging a good question is like throwing a pebble into a still pond. The simple act of thinking about the question sends ripples of reflection through our mind which may stimulate new ideas, remind us what is important, inspire, energize and, ultimately, provide clear guidance in planning for our best life.

The Personal Inquiries Exercise

The Personal Inquires Exercise (PIE) is a tool that we use with clients. The PIE is six* simple, yet important, questions to help you focus and plan. Of course, there are no right answers. The idea is to content yourself to simply inquiry with sincerity and energy, then let the questions work upon you.

Using PIE can be most productive when you follow a few simple suggestions:

Do not rush the process of answering these questions. Reflect on them when the time is right: when you are not rushed, away from distractions, when your energy is good (you are not tired) and when your mind seems somewhat clear and calm.

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Too Many Choices

A survey* of almost 2300 people completed this April found that significantly more Americans (83%) feel their lives are moving in the right direction versus 66% in 2011. It also found that 81% feel optimistic about their financial future.

The primary roadblock to preparing for their future, however, was identified as feeling overwhelmed by financial options and choices particularly for retirement planning and insurance coverage.

At Bucks Country Financial Planning Group we offer a complementary meeting to discuss your financial future. Give us a call to begin planning for your best life.

www.bcfpg.com

805-630-1740

*The 2015 Lincoln Financial Group's "Measuring Optimism, Outlook and Direction of America" survey.

Remember the “wisdom of brushing your teeth”. Often, when you are later doing some mundane task like brushing your teeth or washing the dishes, your mind may effortlessly generate unique responses to these questions. You might keep a notebook (waterproof!) next to the sink.

Live your questions now and perhaps even without knowing it, you will live along someday into your answers. - Rainer Maria Rilke

PIE is not a one and done exercise. Reflect upon the questions numerous times. PIE can be a continual catalyst to help you re-orient and refocus your attention and energy. It can inspire you and fortify a resolve to bring these matters into your daily life. Lastly, the Personal Inquiry Exercise provides clear direction and guidelines for integrating your life planning with your financial planning.

* Questions 4 and 5 come from the work of George Kinder.

**If you don't know where you are going,
you might end up somewhere else.**

- Yogi Berra, Baseball philosopher

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Life, Retirement and Financial Planning
for the Boomers and beyond.

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Financial Planning and Investment Advisory Services offered through
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vestment Advisor.

Personal Inquiries Exercise

1. What is changing in your life but you wish it wasn't? Why?

2. Whom do you admire? (they may be alive or dead. You may or may not know them personally.)

3. Why? What qualities or actions of theirs do you admire?

4. Imagine you had all the money you could ever need to do anything you wanted for the rest of your life. What would you do? How would you spend the money? Whom would you help?

5. Imagine that from this very moment you have only 24 hours to live. Is there anything you wish you had done but regret not doing?

6. Is there anything that needs to change in your life?



SOCIAL SECURITY

“Think it doesn’t matter. Think again!”

Social Security will continue to be a significant source of future income for many of us who are in our fifties and sixties today. Decisions you make now could have a significant impact on you lifetime benefits and security.

Join us for this popular seminar and learn...

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- ❖ When to apply for benefits.
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- ❖ How to coordinate benefits with your spouse.
- ❖ Much more.

Thursday, September 24, 6:00 – 7:30

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Paul is a CERTIFIED FINANCIAL PLANNER® PROFESSIONAL, and
Chartered Retirement Planning Counselor⁵. More information at bcfpg.com.

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