WORKSHEET

"Retirement, Reimagined: Grow and Protect Your Wealth" with David Blanchett, Michael Finke and Bjorn Larson

Use this worksheet to capture reflections, note what stands out to you, and identify one or two actions you want to take after the session. There are no right or wrong answers – this is for your personal reflection. If you'd like to watch the video again, scan the QR code.

Pause 1 (3:47): Wealth starts on the inside

What stood out to you about the idea that wealth is first about who you are, not just what you have?

When you think about "inside wealth" (wisdom, relationships, character), which feels most important in building a lasting legacy? Why?

How might this perspective change how you define financial success for yourself or your family?

Pause 2 (5:23): Why faith and finances belong together

What reaction did you have to the statement that every spending decision is a spiritual decision?

Why do you think many people separate faith from finances?

Write one change you could make to approach money more intentionally as part of stewardship.

Pause 3 (9:36): Redefining generational wealth and legacy

How did this conversation expand or challenge your definition of generational wealth?

If someone feels they don't have much to leave financially, what encouragement stood out to you in this section?

List non financial legacies you want to pass down to the next generation (values, habits, faith, traditions, lessons, etc.).

Pause 4 (17:03): Thinking beyond the moment and using money with purpose

What did you learn from the story of Esau about short term decisions versus long term legacy?

Of the five purposes of money mentioned, which do you think people most often overlook? Why?

How could thinking of money as a tool—not a goal—change the choices you make?

Pause 5 (25:35): Mindset shifts and practical habits for generational impact

Which mindset shift stood out most to you in this section, and why?

(Examples: steward vs. owner, living below your means, consistent saving, wise investing, generosity)

What does healthy stewardship look like to you—avoiding both scarcity mindset and prosperity extremes?

What simple financial habit could make the biggest difference for your family over time?

Pause 6 (32:15): Protecting your family and passing the baton well

Why do you think estate planning and end of life conversations are so difficult? What could make them easier or healthier?

What does it mean to “pass the baton well” financially and relationally?

What practical steps can your family take right now to better prepare for the future?

My Next Steps

One insight from this experience I want to carry forward:

One action I commit to taking in the next 30 days:

One conversation I want to start or continue with my family:

Questions?

Speak with your financial advisor to learn more about creating a personalized plan that reflects your values, priorities and long-term goals.

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