

Capturing a Lifetime of Memories: A Self-Interview

Presented by David M. Weidmayer, CFP®

Getting Started

It doesn't take much to start capturing valuable memories—just a notepad, an audio recorder, or a video camera. While you could write down all the answers, it might be easier and more fun to record them for future generations to hear or, better yet, see! Other than that, the best advice is to be open and honest about your thoughts and experiences. While recording your memories might feel a bit forced at first, you'll be surprised at how easy it flows once you get started.

Keep in mind that you don't need to answer all of these questions in one sitting; this guide can be used over the course of months or even years. You can decide at what pace you want to address these questions, as well as any others that might come to mind. If your children are interested in participating, it can be even more fun. They can use this guide to interview you, and if they have other questions, let them ask!

Questions About Your Values

What values are most important for you to exhibit and to pass on to your kids?

- How have these values helped you in your life?
- How did you learn these values?
- What's a good way to teach them to kids?
- Who are your heroes? Why?
- What do you admire about your kids?

What do you look for in a good friend?

What has helped you most throughout your life?

- Books
- Family, friends, mentors
- Skills, knowledge, behaviors
- Organizations
- Other

What are some of the best financial decisions you've ever made?

- How about your best financial habits or practices?
- Where did you learn about money? What are some of the lessons that you picked up?

Questions About Your Life

What are you most proud of in your life?

What might you change if you could do it over again?

What would you like people to think when they think about you?

What do you know about your family history?

What special things or memories do you have from your mom or dad?

What was your favorite job?

What are some of your most memorable stories? Think about when you were . . .

- Falling in love
- Raising your children
- Visiting or living in interesting places
- Growing up
- Going through moments of joy/sadness/struggle/success
- Taught a valuable lesson
- Proudest of each child

Questions About the Future

What do you hope you'll be able to do or see that you haven't yet done or seen? What would you like to do or see again?

What are you most proud of about your family?

- What steps can you take as a family to do more of that?

If you woke up at 2:00 A.M., what might keep you awake these days?

What is most important to you about where you live?

- If you wanted or had to move from your house, what should others consider when looking at options?

What plans do you have in place for your medical care if something were to happen?

- Do you have a durable power of attorney in place?
- Does it clearly state what your wishes are?

Are you happy with your will?

- Is it up to date, signed, and in a safe place?
- Do you have any advice for family members who may be creating a will?

Is there anything others can do to help you? Or is there anything others should start helping with so they can learn more about it?

Final Thoughts

This valuable record never has to be “closed”; you can always share more about the life you have led, the lessons you've learned, and your plans for the future. The key is that you record what's most important to you. As those who have completed the process have found, creating this gift for future generations is well worth the effort.

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