

**ADVISOR TRAINING MINISTRY**  
**COURSE NUMBER: ESC 300**

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**STEWARDSHIP  
RESOURCE**

**G R O U P**

**ADVISOR TRAINING MINISTRY**  
**COURSE NUMBER: ESC 300**

# **Answering the Three Required Foundational Planning Questions**

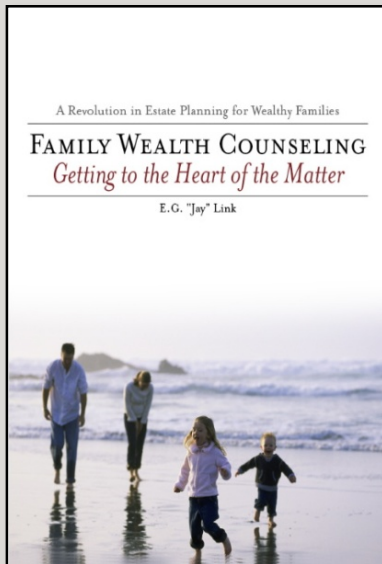
**TAYLOR UNIVERSITY**



**A client cannot and will not do comprehensive and  
integrated planning  
if they cannot answer these  
three foundation planning questions!**



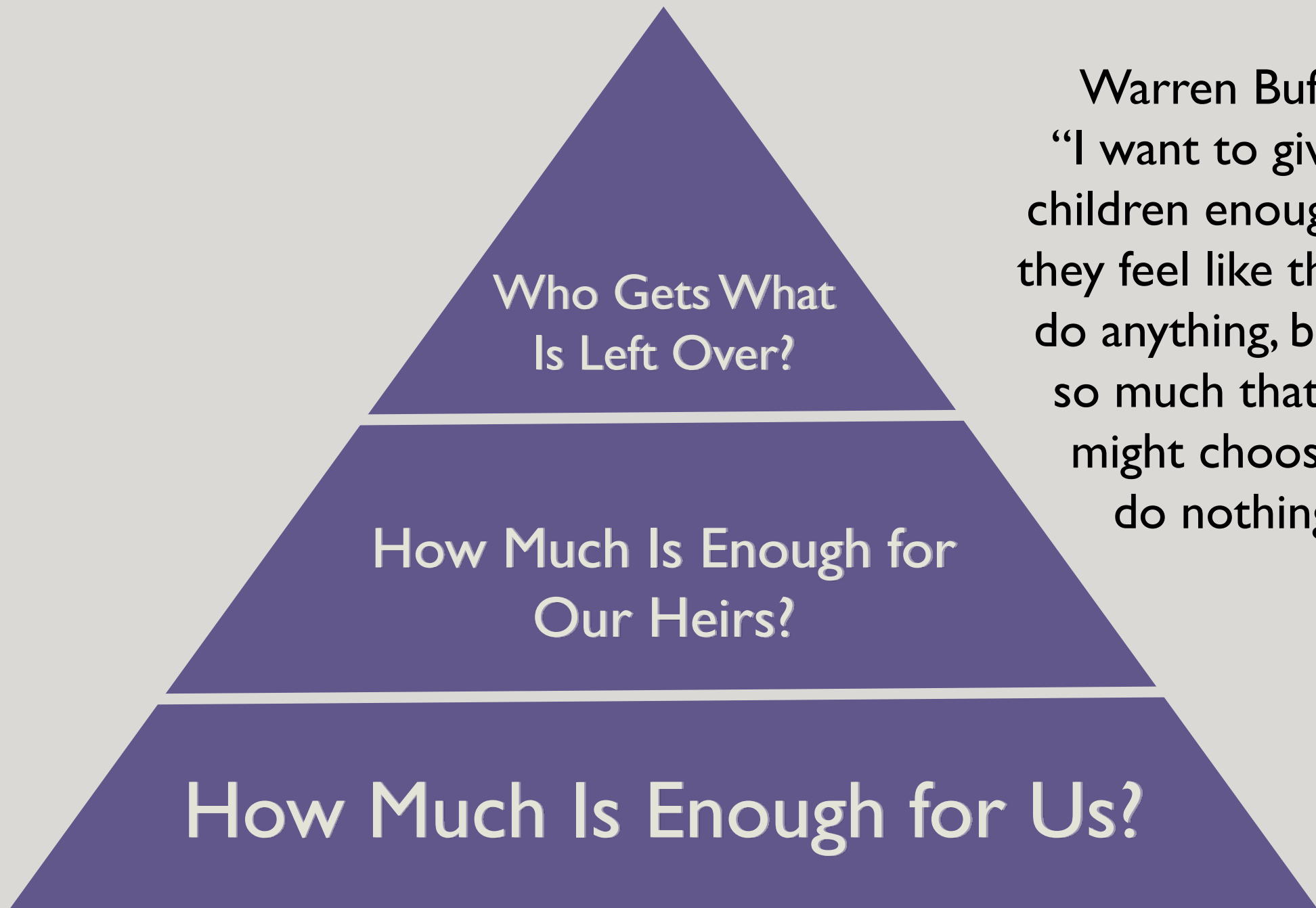
It is critically important that you understand the importance of utilizing the **Psychological Pyramid Of Priorities In Planning.**



Chapter 9  
Understanding the Psychological Pyramid of Priorities







Warren Buffett:  
“I want to give my children enough that they feel like they can do anything, but not so much that they might choose to do nothing.”

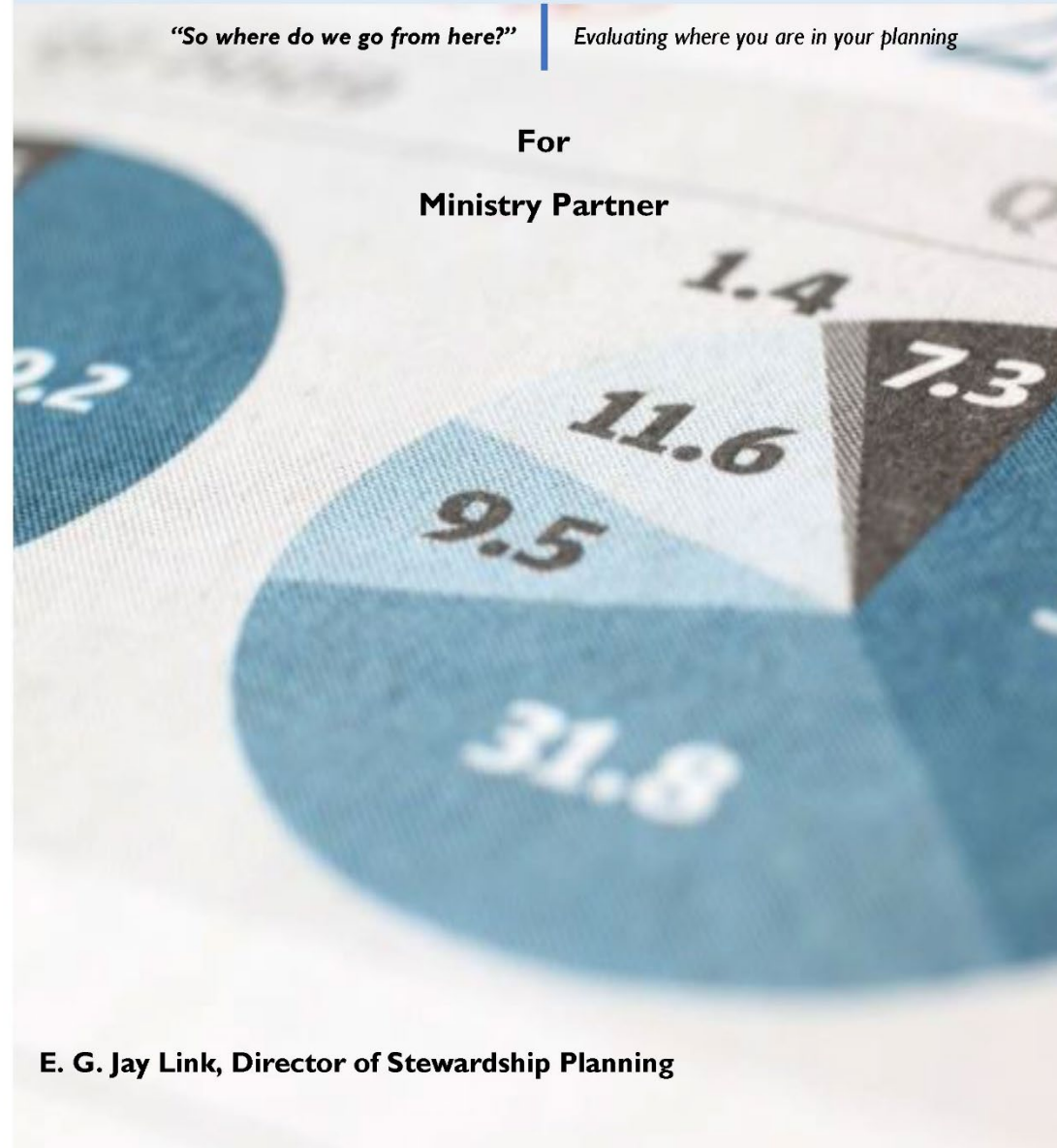
# STEWARDSHIP PLANNING QUESTIONNAIRE

A Ministry of Taylor University

*"So where do we go from here?"*

*Evaluating where you are in your planning*

For  
Ministry Partner



E. G. Jay Link, Director of Stewardship Planning



# Stewardship Planning Questionnaire

The **Stewardship Planning Questionnaire** is intended to be a guide to help you answer three critical questions required to do comprehensive and integrated planning:

1. How much is enough for us?
2. How much is enough for our heirs?
3. What are we going to do with what's left over?

This questionnaire has no agenda except to assist you in discovering what God desires for all He has entrusted you to manage for Him. To elaborate further on this concept of God's ownership, read "What is My Relationship to My Stuff" (page 5) and "The One Question that Changes Everything" (page 7).





# Stewardship Planning Questionnaire

The articles included in this questionnaire are provided to stimulate your spiritual, emotional, and financial thinking. Going outside the box of traditional, secular thinking and planning will allow you to consider these matters through the lens of a biblical worldview.

It is important that both of you **individually work through this questionnaire** and the readings. In this way, each of you can personally hear from the Holy Spirit. Once you have both completed your questionnaires, feel free to share your responses with each other.



# Stewardship Planning Questionnaire

## Questions About Your Lifestyle | How Much Is Enough For Us?

1. How much annual, after tax, income will you need to maintain the lifestyle you believe would be pleasing to the Lord? Read “How Much is Enough?” (page 9) and “Living on Less” (page 12).

### HOW MUCH IS ENOUGH?

1. Restraining our Greed
2. Learning to be Content
3. Deploying our Surplus

### LIVING ON LESS

1. A Change in Perspective
2. A Change in Priorities
3. A Change in Purpose



# Stewardship Planning Questionnaire

## Questions About Your Lifestyle | How Much Is Enough For Us?

2. What level of liquid reserves would you feel comfortable having available for unexpected needs?
3. What real property that you currently manage would need to be retained to maintain your lifestyle?



# Stewardship Planning Questionnaire

## Questions About Your Family | How Much Is Enough For Our Heirs

(Advisor Training Class ESC 800 - Inheritance Planning and Heir Preparation)

4. What are your current inheritance distribution plans for your children?
5. How do you view inheritances to your children? Read “Conducting an Inheritance Fire Drill” (page 15).

### Conducting An Inheritance Fire Drill

Step 1: Discern Your View of an Inheritance

Step 2: Determine the Purpose of an Inheritance

Step 3: Calculate the Timing and the Amount of the Inheritance



# Stewardship Planning Questionnaire

## Questions About Your Family | How Much Is Enough For Our Heirs

6. How prepared are your children to wisely steward the inheritance you are planning to give them? Read “Blessing (and Not Cursing) the Next Generation” (page 19), which outlines four Maturity Markers to help you assess your children’s readiness to receive their inheritance.

How did you rate each of your children using these Maturity Markers?



# Stewardship Planning Questionnaire

Questions About Your Family | How Much Is Enough For Our Heirs

Blessing (and Not Cursing) the Next Generation

Bitter Fruit #1: Lack of Motivation to Work

Bitter Fruit #2: Lack of Perseverance

Bitter Fruit #3: Problems with Relationships

Bitter Fruit #4: Self Worth Struggles

Bitter Fruit #5: Poor Understanding and Managing of Finances



# Stewardship Planning Questionnaire

Questions About Your Family | How Much Is Enough For Our Heirs

Maturity Markers

Spiritual Maturity Marker #1

Emotional Maturity Marker #2

Relational Maturity Marker #3

Financial Maturity Marker #4



# Stewardship Planning Questionnaire

## Questions About Your Family | How Much Is Enough For Our Heirs

7. How did you react to this statement by Warren Buffet: “I want to give my kids enough of an inheritance that they feel like they can do anything, but not so much of an inheritance that they might choose to do nothing?”

Read “When you Give, You Will Take Away” (page 24) for some additional thoughts on the impact of inheritances on your children.





# Stewardship Planning Questionnaire

## Questions About Your Family | How Much Is Enough For Our Heirs

8. Read “Seven Inheritance Conundrums Parents Face in Planning” (page 26). Are any of the seven conundrums true for you and your family? If yes, which ones and why?



# Stewardship Planning Questionnaire

Questions About Your Family | How Much Is Enough For Our Heirs

Inheritance Conundrums

#1: The “Unready” Conundrum

#2: The “Equal vs. Fair” Conundrum

#3: The “Black Sheep” Conundrum

#4: The “Family Dysfunction” Conundrum

#5: The In-Laws/Out-Laws Conundrum

#6: The “Good Steward” Conundrum

#7: The “Generation Skipping” Conundrum



# Stewardship Planning Questionnaire

## Questions About Your Giving | What Are We Going To Do With What's Left Over?

9. What Kingdom causes/ministries are you most excited/passionate about? Why?

Standard giving counsel:

*“Give where you are passionate.”*

Stewardship giving counsel:

*“Give where God is passionate.”*

*Psalm 37:4, Delight yourself in the Lord; and He will give you the desires of your heart.*



# Stewardship Planning Questionnaire

## Questions About Your Giving | What Are We Going To Do With What's Left Over?

10. What are your thoughts regarding outright Kingdom giving (now) vs. deferred Kingdom giving (later) vs. testamentary Kingdom giving (after death)?

Read “When Is a Gift Really a Gift?” (page 27) and “Giving or Leaving” (page 31) for some practical and spiritual thoughts on giving options.



# Stewardship Planning Questionnaire

Questions About Your Giving | What Are We Going To Do With What's Left Over?

Giving or Leaving

Reason #1: Uninformed

Reason #2: Uncertain

Reason #3: Unengaged

Step #1: Imagine (What you could do...)

Step #2: Plan (for maximum impact...)

Step #3: Trust (God to take care of you...)



# Stewardship Planning Questionnaire

## Questions About Your Giving | What Are We Going To Do With What's Left Over?

11. What are your thoughts regarding giving your children a charitable inheritance (resources to give away) as well as a personal inheritance (resources for their personal use)?



# Stewardship Planning Questionnaire

## Supplemental Reading

[StewardshipLibrary.com](http://StewardshipLibrary.com)

- What is My Relationship to My Stuff?
- The One Question That Changes Everything
- How Much is Enough?
- Living on Less
- Conducting and Inheritance Fire Drill
- Blessing (and Not Cursing) the Next Generation
- When You Give, You Will Take Away
- Inheritance Conundrums Parents Face in Planning
- When is a Gift Really a Gift?
- Giving or Leaving?



# Questions and Answers

