



A FREE GUIDE FROM OAKS FINANCIAL SERVICES

What I'd Want to Ask My Parents

A short set of questions to ask them — before there's no one left to ask.

Before you start

Most of what we wish we'd asked, we realize too late to ask. This guide is a chance to ask on purpose, while there's still time — in a real conversation, at whatever pace feels right.

These are questions to bring to your parent (or parents), not to answer yourself. There's no wrong way to use them: ask one at a time over months, or sit down together for an afternoon.

HOW TO USE THIS

- Ask in whatever order feels natural — skip anything that doesn't fit today.
- Write down what they say soon after, in their words if you can.
- There's no deadline. A few honest answers beat a rushed full set.

ONE

Where They Started

1. What's a moment from your childhood that you think about most?

2. What did your family have plenty of, and what did it go without?

3. What's something you believed as a kid that turned out to be wrong?

TWO

How They Decided

4. What's the hardest decision you ever made, and how did you actually make it?

5. What's something you almost did but didn't, and how do you feel about that now?

6. What's a mistake you made that you're glad you made?

7. If you could redo one decision with what you know now, which one — and why?

THREE

What They Actually Believe

8. What do you want me to understand about money that no one explained to you?

9. What's something you value that most people around you don't seem to?

10. What's a rule you live by that you've never actually said out loud?

FOUR

What They Hope for Me

11. What do you hope is true about my life ten years from now?

12. What's something you hope I never have to learn the hard way?

13. What do you want me to know about you that I might not find out otherwise?

14. If you weren't here to say it in person, what's the one thing you'd want me to hear?

Once you've asked these

Keep what they tell you. Write it down while it's still fresh, and come back to it — a story loses less than you'd think, but it does lose something.

There's no wrong way to have done this. The only mistake is never asking.

IF THIS MATTERED TO YOU

This guide is a smaller, self-guided version of something Oaks already helps families do more fully: the Legacy Vault preserves a parent's own voice, values, and wishes, in their words, built through the conversations they already have with their advisor.

Learn more at oaksfs.com/legacy-vault