

Evoke



Life and Wealth Design Process:

How to Know What You Want for Your Life and Wealth and Achieve It Faster

Workbook

by

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This Workbook belongs to:

Date:

What would your life be like if you had a series of strategies that were based on what is truly important to you?

Where your financial assets were working in harmony with your social and personal aims, now and in the long-term?

Take a moment to imagine what that would feel like.

Unfortunately, this place of being is in stark contrast to what I see in the world. I typically see a hodgepodge of financial structures, products purchased over the years from various salespeople based on the “going” wisdom of the time, and a general imbalance among the personal, social and financial aspects of life and wealth.

The key to life planning is to focus on outcomes - setting specific outcome measures or goals- and then to “think backwards” from your desired future to plan the way to get there. Strategy is what distinguishes the approach provided in this workbook from other forms of planning.

You will gain the maximum benefit from this workbook if you follow the exercises in sequence. But, this workbook is meant to be worked on, put down for some reflection time, and then picked up again for additional work and refinement.

Successful Living Requires Clarity and Action

According to success expert, Brian Tracy, clarity accounts for probably 80% of success and happiness.

Lack of clarity is more responsible for frustration and underachievement than any other single factor. That’s why we say that "Success is goals and all else is commentary."

Why Set Goals?

People with clear, written goals, accomplish far more in a shorter period of time than people without them could ever imagine. This is true everywhere and under all circumstances.

I have created this Workbook to help you achieve the clarity you need to set meaningful goals for yourself. It serves as a guide to help you get from wherever you are to wherever you want to go. It is a vital part of a proven system that you can use to design and achieve the lifestyle you want.

Getting Started

Despite the continued slow recovery of the developed economies of the world, people are flourishing. Unfortunately bad news sells more than hope and optimism so we rarely hear about their stories in mainstream media.

Mark McCormack, in *What They Don't Teach You at Harvard Business School*, tells of a Harvard study conducted between 1979 and 1989. In 1979, graduates of the MBA program were asked “Have you set clear, written goals for your future and made plans to accomplish them?” It turned out that only three percent (3%) of the graduates had

written goals and plans. Thirteen percent (13%) had goals, but they were not written. Eighty-four percent (84%) had no specific goals at all, aside from getting out of school and enjoying the summer.

Ten years later, in 1989, the researchers interviewed the members of that class again. They found that the thirteen percent who had goals that were not in writing were earning, on average, twice as much as the eighty-four percent of students who had no goals at all. Most surprisingly though, the researchers found that the three percent of graduates who had clear, written goals when they left Harvard were earning, on average ten times as much as the other ninety-seven percent of graduates all together. The only difference between the groups was the clarity of the goals they had for themselves when they graduated.

A design without action steps is a dream. How many people do you know who read inspiring books or hear a motivational speaker and talk about a dream they have but never seem to get closer to that vision? How many business owners spend hundreds of hours on a written document that becomes a coveted document regularly reviewed and tweaked but never actually implemented?

The challenge is, many people think that goals aren't important. If you grow up in a home where no one has goals or you socialize with a group where goals are neither discussed nor valued, you can very easily reach adulthood without knowing that your ability to set and achieve goals will have more of an effect on your life than any other skill. The challenge is many people simply don't know how to set and achieve their goals. In fact, many people think they have goals supported by a financial plan. Unfortunately, very often these are really a series of wishes or dreams, like "have money saved for the future" or "have a good relationship with my family".

Success Tip: It's Not Where You Start – It's How You Finish.

I recall being interviewed on television several years ago on the (now outdated) subject of retirement. The woman interviewing me asked her key question: "what do you tell people who are only a few years away from retirement age but don't look like they'll make it?" I recall stating without much hesitation that these people need to get creative, stop letting society tell them how to live their life and evaluate what is achievable. She looked at me like I was insane, yet that was a clear recipe for "success" for many people. It is a matter of perspective.

More people today fear change and are concerned about the future than at any other time in history. One of the great benefits of goal setting is that goals enable you to control the direction of change in your life. Goals enable you to ensure that the changes in your life are largely self-determined and self-directed. Goals enable you to instill meaning and purpose in everything you do.

So how do you architect an integrated life and financial plan that is both positive and real?

In summary, you must first perceive a reality in which success is possible in various areas of your life. Then map a route to success. Once you make progress on that route, your brain will be able to release success accelerants to get you there faster. Review, adapt, and serve as a role model to others. This workbook will walk you through the process of plan creation.

Successful Living Requires Navigation Tools

As the late Steven Covey wrote: "begin with the end in mind".

Part I

Review and Insights

In the first phase of the workbook, I want to walk you through getting some ‘concrete’ insights on your business and personal performance. Taking some time to reflect on our performance allows us to get insights on where we’ve been, what we’ve been doing and grounding us in a place of reality.

‘Reality Distortion’ is a place where most people live. ‘Reality Distortion’, is having a skewed or falsely assumed look on our business and lives, because we only think in our heads and never take the time to look at what the results were truly getting from our activities, behaviors, systems, etc.

Athletes look at game film and track all their training routines. Actors and speakers look at film. If we want our lives to perform at a next level, we are no different.

The Life & Wealth Compass – A Marker to Aid in Finding Your Bearing

A compass helps you determine your position on a map and keep you headed in the direction of your destination. If you change course or encounter obstacles that might not show on the map, a compass can help you guide you to your destination.

“You can run after satisfaction, but satisfaction must come from within”

The Life & Wealth Compass is a tool that can be used to assess each of **the 8 Facets of Daily Living**.

**Social
Community & Causes/Spirituality
Mind**

Lifestyle
Body
Family
Productive Pursuits
Financial

Your life is multifaceted and each of the 8 Facets of Daily Living listed above contribute to the overall quality of life you experience.

I like to measure this and you will see it listed as “QOL” or “Quality of Life Indicator”.

The reality is that quality of life as an indicator is a guide rather than a yardstick. Quality of life is subjective and therefore means different things to different people. It is entirely possible to improve your overall quality of life score over a period of time to then effectively raise your own standards and thus start the improvement process again. The great news in that situation is you “broke through” to a new level from the one you had previously defined for yourself!

Social Facet of Daily Living

This category includes spending time with at least one friend, new social relationships you would like to build, time with best friends, cultivating relationships with like-minded people, organizations to expand your relationships, relationships you would like to expand, limit or eliminate.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor	Fair	Good	Very Good	Excellent
1 2	3 4	5 6	7 8	9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Community & Causes/Spirituality Facet of Daily Living

This category includes activities you participate in or support that have an impact on societies, groups or causes as well as living religious beliefs, reading books on spirituality, meditation, finding and pursuing your unique gifts and purpose.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor	Fair	Good	Very Good	Excellent
1 2	3 4	5 6	7 8	9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Mind Facet of Daily Living

This category includes activities and educational opportunities that increase understanding, knowledge, skills and mental acuity, your career and other things that involve meaningful work, your money attitudes and beliefs and the exhibition of positive money behavior. You may also want to incorporate more free time into your day, read or seek counseling.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor Fair Good Very Good Excellent
1 2 3 4 5 6 7 8 9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Lifestyle Facet of Daily Living

This category includes activities for personal enjoyment and for refreshing the body, mind and spirit; the type and location of housing and whether you want a mobile lifestyle or want to settle in one place; general travel and adventure; luxuries; what you do with your time.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor Fair Good Very Good Excellent
1 2 3 4 5 6 7 8 9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) Yes No

Body Facet of Daily Living

This category includes your health and nutrition, personal care, and general vitality. Thought starters for this area include: increasing flexibility, stamina and/or strength, upgrading your appearance, reducing sugar, caffeine and fatty foods, going to bed earlier or getting up earlier, scheduling annual physicals, etc.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor Fair Good Very Good Excellent
1 2 3 4 5 6 7 8 9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Family Facet of Daily Living

This category relates to your inner circle of immediate family, close relationships and extended family, if you wish. Thought starters include, but are not limited to: attracting Mr. or Ms. "right", visiting or helping parent(s), spending more time together as a family, annual friend retreat, "date night", forgive or make amends with a relative, plan special activities, etc.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor	Fair	Good	Very Good	Excellent
1 2	3 4	5 6	7 8	9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Productive Pursuits Facet of Daily Living

This category is about your human capital, whether it results in the exchange of money or not. Thought starters include, but are not limited to: your career(s), your business(es), part-time consulting, teaching whether paid or not, etc.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor	Fair	Good	Very Good	Excellent
1 2	3 4	5 6	7 8	9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Choose. Is this a key area of focus for your integrated life and wealth map for the next 12 months or the next 90 days? (Circle one) **Yes** **No**

Financial Facet of Daily Living

This category includes any overall financial goals or wishes that don't fit anywhere else. It can include how well your career or business supports your life, the amount of debt you carry, protection against catastrophic events such as death, disability, job loss, or environmental disasters, and your relationships with various financial advisors. It also covers cash flow and how well that is working.

On a scale from 1 to 10, how satisfied are you in this area right now?

Poor	Fair	Good	Very Good	Excellent
1 2	3 4	5 6	7 8	9 10

Score: _____

Why did you rate your level of satisfaction as shown above?

What must happen to change your score?

Money Inventory

Now, let's dive into some numbers. Do your best and don't let this stop your progress.

Money Inventory TM Worksheets

CONSUMPTION BUCKET

Food	Frequency		
	Weekly	Monthly	Annual
Groceries			
Restaurants			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Clothing & Accessories	Frequency		
	Weekly	Monthly	Annual
Adults			
Children			
Cleaning/Laundry Service			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Transportation	Frequency		
	Weekly	Monthly	Annual
Fuel & Oil			
Repairs & Maintenance			
License & Taxes			
Public Transportation			
Parking			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Housing	Frequency		
	Weekly	Monthly	Annual
Furniture/Furnishings			
Landscaping/Gardener			
Repairs/Maintenance			
Domestic Help			
Association Dues			
Other _____			
Other _____			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Money Inventory TM Worksheets

Utilities	Frequency		
	Weekly	Monthly	Annual
Electricity			
Gas/Propane			
Water			
Phone/Mobile			
Internet			
Cable/Satellite tv			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Health Care (out of pocket)	Frequency		
	Weekly	Monthly	Annual
Doctor			
Dentist			
Eye Care			
Prescriptions			
Fitness/Trainer			
Physiotherapy			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Personal	Frequency		
	Weekly	Monthly	Annual
Hair Care/Cosmetics			
Subscriptions			
Travel/Vacation			
Entertainment			
Pocket Money (Me)			
Pocket Money (Him/Her)			
Education/Extra Curricular			
Music/Technology			
Bank Fees			
Sub total			

Convert to Monthly

--	--	--

Who & How Much?		
HH	IND1	IND2

Commitment Bucket Total
 (transfer from the Commitment Bucket)

Commitment Bucket %
 (Commitment Bucket total divided by Total Monthly Spending)

Consumption Bucket Total
 (Add all sub-totals together)

Consumption Bucket %
 (Consumption Bucket total divided by Total Monthly Spending)

Coming Bucket Total
 (transfer from the Coming Bucket)

Coming Bucket %
 (Coming Bucket total divided by Total Monthly Spending)

=====
 Total Monthly Spending
 (Add the Bucket totals above)

Money Inventory TM Worksheets Part II

Financial Capital

Cash & Deposits

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency

Marketable Securities

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency

Other Investment Assets

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency
Stock Options					

Retirement Plan Assets

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency

Investment Real Estate

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency

Personal Residence(s)

Description	Institution	Ownership	Current Value	Currency	Current Value Converted to Base Currency

Financial Liabilities

Description	Institution	Ownership	Current Amount Due	Currency	Current Amt Due Converted to Base Currency	Interest Rate
Overdraft						
Loan 1						
Loan 2						
Loan 3						
Credit Card 1						
Credit Card 2						
Credit Card 3						
Credit Card 4						
Life Ins Loan						
Promissory Note						
Mortgage 1						
Mortgage 2						
Mortgage 3						

Base Currency:

Conversion rate used

Congratulations for completing that assessment work! In the next section, we're going to see what insights we can obtain from it.

Just as athletes and performing artists review film and businesses review their performance indicators, we need to gather and review our personal and financial data to be able to achieve what we want in life.

INSIGHTS

Quality of Life Indicator

Add the scores of each of the 8 Facets of Daily Living together and place that number here: _____.
Now, divide that sub-total by 8 to arrive at your

QOL Indicator: _____

Life & Wealth Compass

Refer back to the 7 Facets of Daily Living to help you complete the following questions.

In what areas do you feel you are on the right course and why? If you maintain your current course (or status quo) in these areas of life and wealth, what will your sense of satisfaction likely be in 5 years? 10 years?

Are there any areas in your life where you would you like to change course? If so, list them below and why.

The 10 greatest things that happened in the last 12 months/90 days are:

- | | |
|----|-----|
| 1. | 2. |
| 2. | 4. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

If I could live the last 12 months/90 days again, I would do these three things differently:

- 1.
- 2.
- 3.

One word that best sums up and describes the last 12 month/90 day's experiences: _____

Three things I need to do less of this year/in the next 90 days:

- 1.
- 2.
- 3.

Three things I need to do more of in the next 12 month/90 days are:

- 1.
- 2.
- 3.

The things I need to stop doing altogether in the next 12 months/90 days are:

- 1.
- 2.
- 3.

Part II

Life Design

VISION

The word 'Vision' itself can be a challenge to a lot of people, because they automatically think they need to come up with a 'crystal clear' picture of what they want to have 1, 3, or 5 years from now. But if you don't 'think' visually, the process can be a hard one for you.

At the end of the day, your Vision is the imaginary thing pulling you forward. It can be fueled by something inspiring or it can be fueled initially by something perceived as 'negative'. I remember being inspired to create a compelling vision that included returning to my high school one day as a successful professional. This came about because of an administrator who told me that because of who my father was, I could never amount to anything so I shouldn't bother taking "advanced level" courses.

Visualization is a very important step in the planning process. It can act as a mental rehearsal- a way to sample or try out many lifestyle choices prior to making any commitments.

Frederic Hudson explains: "... What is the future? Not something waiting for you but something you create through your imagination. The future is possibility waiting for form, the 'not yet' waiting to be programmed."

So, if you're just starting out with this system and you don't really have a strong and powerful vision for your life, that's okay. It'll come. As my yoga instructor likes to say, just use what's available to you right now.

The key here is to not get caught up in the 'concreteness' of Vision. Vision has nothing to do with being concrete. It has everything to do with suspending disbelief, wondering what the future could hold and articulating that possibility.

This could be your great aspiration for how your life will be better in some way. As you define your vision, shoot for clarity and focus as much as you can. For example, if you see yourself operating from anywhere in the world, serving more specialized types of customers, or experimenting with different products or services, put it all down. A key part of creating that vision, is to ensure it's clear, whatever it might be.

Imagine the life you want and then continue to build on the images that form. The sharper and clearer your vision becomes, the more it will guide and direct the decisions you make and the actions you take on a short-term basis. This is one great way to adopt a "future focus" that will guide you to a life that you have designed for yourself (and perhaps your family as well).

So, let's get started! We're going to create a vision at the highest level of perspective (what I'll often refer to as the 30,000 foot level) and also at a more detailed level (what I'll often refer to as the 15,000 foot level). The analogy is to think that we could get into an airplane (or maybe simply sprout wings like a bird). The idea is we can essentially "look down" from that point of view onto our own life, then ask the question of what can we see ourselves doing, or who we are being, where we are, etc).

We're going to address the 15,000 foot level by circling back to the 7 Facets of Daily Living. Then, we'll move up to 30,000 feet and check in.

Life & Wealth Compass

Refer back to Part I to complete this section. Which of the 7 Facets of Daily Living did you indicate would be an area of focus? Find them below, in addition to the Financial Facet of Daily Living, and complete the questions keeping the Range of View in mind.

To explain the concept of "Range of View", let's circle back to vision for a moment. As we have already learned, the most powerful visions address and align your personal dreams. It is also true that your professional vision, that is, your vision as a business owner or in your career, both funds and enables your personal vision.

When you start to envision a significant accomplishment- something that might be well beyond what you've achieved in the past – the question that most people ask themselves is "how would I actually do this?" This is the wrong question at this point in this system. The fact is you don't know how to do it because if you did, you'd likely be doing it already and thus living that reality.

Create a range of view

So, I created the concept of the range of view so that we can allow that big vision to exist on paper as one possibility rather than edit it down. But other variations can exist as well, thus creating a range for a view (aka vision).

Thus, for each of the 7 Facets of Daily Living, you will be creating two versions of your vision for that area of your life. For ease, we're using two extreme opposites of a range: the ideal and the minimally acceptable. From here you can vary one or two aspects until you feel like you can create some outcomes that will get you closer to that vision. Don't forget to refer back to the "what must happen" question you answered in Part I to assist you with listing outcomes.

Social Relationships Facet of Daily Living

This category includes spending time with at least one friend, new social relationships you would like to build, time with best friends, cultivating relationships with like-minded people, organizations to expand your relationships, relationships you would like to expand, limit or eliminate.

Imagine you are experiencing your ideal life in your social relationships. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the minimum that is acceptable to you in this area; just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Community & Causes/Spirituality Facet of Daily Living

This category includes activities you participate in or support that have an impact on societies, groups or causes as well as living religious beliefs, reading books on spirituality, meditation, finding and pursuing your unique gifts and purpose.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the minimum that is acceptable to you in this area, just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Personal Growth/Psychology Facet of Daily Living

This category includes activities and educational opportunities that increase understanding, knowledge, skills and mental acuity, your career and other things that involve meaningful work, your money attitudes and beliefs and the exhibition of positive money behavior. You may also want to incorporate more free time into your day, read or seek counseling.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the minimum that is acceptable to you in this area, just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Financial Facet of Daily Living

This category includes any overall financial goals or wishes that don't fit anywhere else. It can include how well your career or business supports your life, the amount of debt you carry, protection against catastrophic events such as death, disability, job loss, or environmental disasters, and your relationships with various financial advisors.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the **minimum** that is acceptable to you in this area, just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Lifestyle Facet of Daily Living

This category includes activities for personal enjoyment and for refreshing the body, mind and spirit; the type and location of housing and whether you want a mobile lifestyle or want to settle in one place; general travel and adventure; luxuries; what you do with your time.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the **minimum** that is acceptable to you in this area, just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Physical Facet of Daily Living

This category includes your health and nutrition, personal care, and general vitality. Thought starters for this area include: increasing flexibility, stamina and/or strength, upgrading your appearance, reducing sugar, caffeine and fatty foods, going to bed earlier or getting up earlier, scheduling annual physicals, etc.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the **minimum** that is acceptable to you in this area; just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? What would you like to become, have, accomplish or do? Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Ideal Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Family/Close Personal Relationships Facet of Daily Living

This category relates to your inner circle of immediate family, close relationships and extended family, if you wish. Thought starters include, but are not limited to: attracting Mr. or Ms. “right”, visiting or helping parent(s), spending more time together as a family, annual friend retreat, “date night”, forgive or make amends with a relative, plan special activities, etc.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the **minimum** that is acceptable to you in this area; just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? (What do you want to become, have, do or accomplish?) Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

Productive Pursuits Facet of Daily Living

This category is about your human capital, whether it results in the exchange of money or not. Thought starters include, but are not limited to: your career(s), your business(es), part-time consulting, teaching whether paid or not, etc.

Imagine you are experiencing **your ideal life in this area**. Describe how you feel, how you are being, what you are experiencing. Write it in the present tense as though it is happening now.

Imagine you are experiencing the **minimum** that is acceptable to you in this area; just above the point at which you would simply be tolerating this area of your life. Take what you have written above and swap out the descriptions. Write it in the present tense as though it is happening now.

What are some outcomes that need to happen to achieve the vision for this Facet? (What do you want to become, have, do or accomplish?) Write them below. Then go back and assign a time frame to when you want to achieve the outcome. (Write as many as you wish, however we do not recommend more than 3)

	Outcome	Time (date or milestone)
1.		
2.		
3.		

	Minimally Acceptable Outcome(s)	Time (date or milestone)
1.		
2.		
3.		

Why must this happen for you? What are the emotional benefits (or costs)? What makes this meaningful to you?

List the estimated financial cost of resources or services needed to carry out the required action(s).

	I/MA	Resource or Service Needed	Approx. Cost
1.			
2.			
3.			
4.			
5.			
6.			

The Destination – Vision of Your Overall Life

Now you’re ready to go to 30,000 feet.

Imagine that you’ve been pulled into an alternate reality. It’s one year from tomorrow. You have a conversation with your “future self.” What does the “future you” tell you about what happened over the past year? Why are they excited?

What are 3 things you're proud of 3 years from now?

- 1.
- 2.
- 3.

Take all of that insight and write out your vision for your life. Do not worry about the time frame. Just write.

What's Your Story?

A large, empty rectangular box with a thin black border, intended for writing a vision statement or story.

GOAL SETTING

“A goal is created three times. First as a mental picture. Second, when written down to add clarity and dimension. And third, when you take action towards its achievement.” --- Gary Ryan Blair

“There is no greater guarantee of a long, happy, healthy, and prosperous life than for you to be continually working on being, having, and achieving more and more of the things you really want. Clear goals enable you to release your full potential for personal and professional success. Goals enable you to overcome any obstacle and to make your future achievement unlimited.” --- Brian Tracy

In the last section, you identified outcomes and dreams you would like to achieve, and you created a range of view. In order to actually achieve these outcomes, you need to convert them to compelling goals. This turns them from aspirations to a motivating target that you can take specific actions to achieve.

Top 10 Goals

Pulling from all of the materials, list below the top 1 to 10 outcomes you want to focus on in the next 12 months. Be sure to include the category in the box next to each goal/outcome, the deadline and whether this is the Ideal or Minimally Acceptable version of the outcome.

	Category	I/MA	What will you specifically obtain or achieve?	By what date?
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Balance Check

Do the goals you listed above represent each area of your life in a way that is reasonably balanced? We're not looking for perfection here and it's ok if some areas have more attention than others. Just be clear that you are designing your life in this way.

Your goals are the road map directing your life. Before we get too far in the map creation process and start integrating it with your money, take a moment to think about what the map looks like on a daily basis. Are you focusing exclusively on one area at the sacrifice of other areas? If so, make the necessary changes before moving to the next step.

Top 3 Goals (Your "Non-Negotiables" for this year)

Prioritize your goals into your most important priorities for the year. These are the "must haves". If there are any tradeoffs or negotiations with others, what are your "non-negotiables" for the year?

	Category	I/MA	What will you specifically obtain or achieve?	By what date?
1.				
2.				
3.				

Congratulations! Depending on your level of skill with this system, you may have moved through the material quickly or it may have taken some time and felt somewhat overwhelming. As with any new skills, it takes some practice, but like riding a bike, once you master it, you'll hardly think of the process and focus instead on where it gets you!

*"Knowing is not enough; We must apply.
Willing is not enough; We must do."
-Johann Wolfgang Von Goethe*

