

Jim Smith's Annual Goal Planning Kit for Individuals



Where are you heading this year?

Planning Kit courtesy of



Happiness is a decision, not an event!

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Goal Planning Guide – Instructions and Tips

I'm excited that you're interested in the process of doing some annual goal planning. What has worked well for my wife and me is to set aside a dedicated planning day. You may wish to answer the questions and complete some assessments *in advance of your retreat time*. This way you have the opportunity to collect your thoughts and can focus your time on analyzing your responses to the thought-provoking questions. Plan to begin your session mid-morning, and promise to go until you finish everything as well as any new items that pop up.

Here's some ideas on how to create a 'sacred space' for your own planning day: find the most comfortable part of the house, bring blankets and pillows for comfort, and have plenty of hot tea, coffee, and snacks available for yourself. Sit in front of the fireplace (if you have one) or in your favorite thinking space. Dress comfortably – I wear sweats and warm socks. If you've got kids, make arrangements for someone to take them for the day. Take the phone off the hook, and turn off your mobile, computer, and email. **NO INTERRUPTIONS!**

The assessment tools are self-explanatory. **You can do some, none, or all of them depending on your stamina and the issues facing you for the coming year.**

Be sure to have note paper & pen, a calculator, a calendar and any support documents (i.e. bank statements, investment reports, Quicken/QuickBooks reports, etc.). At the end of your session, which might be many hours, you will have your game plan for the year.

Cheryl and I have been planning like this for many years, both individually and together, and we are always amazed at how many of our goals we actually meet, because we've talked them through and really committed to do them. Make no mistake about it: the **REAL POWER** of this day is not about the specific goals – it's about the **CONVERSATION** that you have with yourself about every possible subject – or perhaps more the **REFLECTION** you allow on these subjects. This review will get you to think about many aspects of your life.

When you are all done, clean up and treat yourself to something you've earned with your hard work, e.g. dinner at one of your favorite restaurants, a favorite movie, or a date with a friend. Select a reward that you will truly enjoy. Be prepared to be exhausted and yet enjoy the feeling of exhilaration knowing that you have a game plan for a successful year.

Additional Success Tips

- Personalize this process to fit you!
- Address those questions and sections that resonate with you and set aside those that don't.
- This is not an all or nothing process. Expect that some questions are challenging and may be better visited at another time.
- Resist the temptation to skip "tough" questions that could provide your greatest growth.
- Use additional blank sheets or the back of a page if you need more space to write.
- Have fun with this process... Push a bit into your discomfort for real growth.
- Ideally you start at the beginning and work to the end. However, wherever you begin is the "right" place.

Enjoy your planning! In happiness,
The Executive Happiness Coach®





AGENDA: Annual Goal Planning

For: _____

Date: _____

PREWORK – complete ahead of time, then compare:

- Final Look Back: Last year in review
- First Look Ahead: Annual goal planning questions
- First Thoughts – discussion starters
- Personal Balance Priority List
- Tolerations
- Happiness Audit – How am I doing?
- Clean Sweep – a look at my environment
- My Core Values
- Financial Checklist & Estate Planning Review

The FUTURE

- Improvements & Updates: What are my big “Wants” for next year?
- Finalize vacations and use of my personal time
- A Look Ahead: 20-year rolling plan
- Ten Tips for Better Resolutions
- Final Action Plan(s)

- Complete any unfinished matters
- Dinner & self-care time

LAST YEAR IN REVIEW

1. What did I accomplish during the last year that I am most proud of?
2. What did I like best about last year?
3. What did I like least about last year?
4. What have I learned from the last year that I will do differently this year?
5. Describe the success I had with the goals I set for myself.
6. What didn't happen that I wish had happened?
7. What didn't turn out the way I expected and what lesson did I learn from this?
8. What have I learned about the key people in my life and what impact has this had on my relationship with them and me?
9. What did I create this year that I am pleased with?
10. What am I most grateful for in the past year?
11. What are some new insights that I have learned about myself and what impact have the insights had on me?

FIRST LOOK AHEAD AT NEXT YEAR

1. If I could wave a magic wand, what would I create for the next year?
 - Personally
 - Family
 - Career
 - Finances
 - Other
2. What help do I need from others to achieve my objectives for next year?
3. What are my thoughts regarding vacations for the upcoming year?
4. What home projects do I want to list and prioritize?
5. What issues (if any) do I have related to my personal finances?
6. What are some new standards I would like to hold myself to this year?
7. What would make next year the best year of my life (think Big here)?
8. What question (s) have I not asked myself that you wish I had asked?

First Thoughts – and creating new stories

Instructions: The following stem sentences are incomplete sentences that you keep repeating with a different ending each time, without worrying if each ending was literally true or in conflict. This exercise is about recognizing the 'stories' you hold about yourself and others, and perhaps trying on new versions.

You may have 2, 3, or even more than 10 different endings to each sentence. The first few will likely be the 'safe' responses, the versions you already carry around with you and that come up automatically when people ask you. Keep going until you notice yourself being surprised by what comes up next!

Completing this exercise stimulates your mind to open up to new possibilities and **discover new stories that you like even better**, and want to Grow Into during the next year. The answers to your future are in you!

Stop and Write (it may help to talk w/ a friend coach about these, too)

1. Regarding my life, I'm becoming aware..._____
2. I want my life to look like..._____
3. When it comes to communicating with others about what I want..._____
4. Right now it is very clear that..._____
5. If I were willing to let people know what I need and what is important to me..._____
6. What I want more than anything from my relationships is..._____
7. When it comes to religion and faith, I..._____
8. What I am aware of about my work is..._____

9. My income potential can be..._____

10. What motivates me is..._____

11. The true source of my happiness..._____

12. The idea of developing new interests makes me feel..._____

13. My true feelings about traveling & exploring new places include..._____

14. To really rock my world, I..._____

15. My interest in a relationship can be described as..._____

16. My opportunities are limited when I think like..._____

17. (opt) When I think about my children I feel..._____

18. My major focus around money is that..._____

19. From a romantic perspective, I feel..._____

20. The focus of my next 5 years will be ..._____

21. Involving my family will include..._____

22. When I think of retirement I think of..._____

23. What I am often grateful for includes..._____

24. * _____

25. * _____

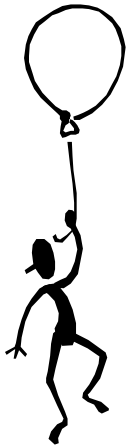
26. * _____

*You might create several sentence starters that apply to you and your situation.

Balance Priority List

Take your own oxygen first -- Things I need to do for myself

Listed here are four categories in which it is important to feel balanced. List the top 3-5 activities you sense **MUST** be in your life on a regular basis for you to feel "whole." These are generally activities that must be either in your daily or weekly routine, although some of them may be monthly or quarterly. The key to focus on is: list only the items you know have to be in your life regularly or you would immediately feel overwhelmed or empty.



Work	Play
Inspiration	Self-Care

How to use this list:

This is NOT a "to-do" list. Set it aside. The next time you feel out of balance, pull this out. Is there an area you feel out of balance with? Decide what step you'll take in the next seven days to begin making that a regular, habitual part of your life again. What one step can you take that you've been putting off, resisting or ignoring...? That's the one!

Keep it updated:

What nurtures you today may not be as relevant next year. Your interests change, you move thru different phases of life, and so on. Give yourself permission to evolve, and when something no longer fills your oxygen tank, remove it and replace with a new practice.

And remember:

This is not about being selfish, or about ignoring your many other priorities. It is about recognizing that, **as a human being**, you will burn out if you focus only on one part of you. And *if you ignore your own needs*, you will lose the capacity to inspire others and build positive relationships (in your home, family, community, or at work), if the relationship you have with yourself is weak.

Tolerations Worksheet

Everyone has at least 100 things they are tolerating, right now. Large or small, each of those creates another "open thread" in your brain and occupies space. As tolerations accumulate, your capacity for happiness, creativity, and effectiveness are reduced. When you identify and act on your tolerations, you free up personal energy, reduce your stress load, and increase your capacity for happiness.

Step 1: Write down as many responses as you can for the question: "What am I tolerating in my life/career that I am no longer willing to tolerate?" (Use additional sheets as necessary.)

Think about all the different environments in which you operate: Physical (your workspace, your car, each of the rooms in your home), Relationships, (your boss, coworkers, significant others, family, groups you belong to), Spiritual, Self (diet, fitness, personal time/space), and so on.

1	14
2	15
3	16
4	17
5	18
6	19
7	20
8	21
9	22
10	23
11	24
12	25
13	26

Step 2: Take action: (1) Do it, (2) Delegate it, (3) Defer it until you have the time/resources, or (4) Dump it – let it go, and move on.

Get started now! Each toleration you address is the equivalent of fixing another 'leak' in your oxygen tank! Choose 2-3 of the items on your list, and make a commitment to yourself: "What will I do about <that> and by when?"



The 13 Principles of Happiness

1. Become Positively Self-ish

When you take care of yourself *first*, you build a foundation for stronger relationships with others, increase your capacity, and reduce doubt.

2. Live Your Values

Clearly identify and proclaim your personal values through the way you live and work. You are more likely to spot opportunities when you know what they look like.

3. Live for Life, not Stuff

Let go of possessions, roles, lifestyles that others and a marketing-hyped society impose on you; focus instead on what truly brings you Joy.

4. Be Early

Whether it is project deadlines, appointments, or learning opportunities, get there before you are expected, and watch your stress load decrease exponentially.

5. Build Reserves

Identify what worries you, and work to create extra in your life, whether that is money, personal space, or extra toilet paper in the cabinet.

6. Tolerate Nothing

Continually identify and eliminate all the little "stuff" which causes you friction and drains your energy.

7. Choose to Respond

What happens is going to happen, regardless. Accept constant, discontinuous change as reality and instead of reacting, respond with curiosity.

8. Stimulate Your Development

Surround yourself with environments and people that continually challenge you, energize you, and literally pull you forward. Have adventures.

9. Pay Attention

When we are on auto-pilot, life just happens around us. Look. Listen. Notice. The sunset in your own backyard can be just as wondrous as the one at the beach.

10. Simplify

Automate, delegate, or eliminate tasks or goals that complicate your life. Being content with simpler pleasures increases your opportunity for awe.

11. Speak the Truth

Stop playing games. Recognize that though the truth may sometimes sting, it is the starting place for all progress. Challenge others to see the truth.

12. Focus on Today

Waiting for something to happen "tomorrow" in order for you to be happy is like watching yourself in the mirror and saying "You go first."

13. Be Authentic

Be yourself, not somebody else. When the Real You shows up, connections are easy.



Happiness is a decision anyone can make. How will YOU decide today?

Taking the **HAPPINESS AUDIT** will increase your awareness of the personal practices and beliefs that impact living a happy life—and how well you are living those today. Every statement in this tool reflects a belief or practice that has been positively connected with happiness – in other words, people who say “yes” to that statement consistently experience greater levels of happiness and positive emotions than those who say “no.”

There is no “right” score; there is only where YOU are, right now. If you work to balance your scores in all areas or strengthen the scores in any one area, you will experience more positive emotions and increased resilience in your life. You will also find that your impact on others grows more positive.

Instructions

1. Select any category to begin: *Self-care, Authenticity, Emotional Well-being, Power to Choose, Intentional Actions, Relationships, Goals and Purpose, Problems and Tolerations, Environments, and Job and Career*
2. Check the box preceding each statement that is true for you.
3. **Be rigorous; be a hard grader.** DO NOT check a box until the statement is virtually ALWAYS true for you. (No "credit" until it is really true!)
4. In the chart to the right of each category, record the number of checkmarks for that category by coloring in the blocks.
5. Carry your scores to the wheel on page 7. The goal is, first, to **achieve balance**. Then you can work to fill the entire chart in each category. In the meantime, you will have a current picture of how you are doing in each area.
6. Keep notes on the actions you will take in each area. **Putting your goal in writing** will dramatically increase the probability that you will achieve it!
7. **Let your awareness work for you.** Over the next year, take the assessment several more times and update the charts accordingly. Your scores will likely increase naturally. This is because you've begun to think more about these items, just by scoring yourself once.
8. **Keep reviewing until all the boxes are filled in.** You can do it! This process may take 30 days or 30 months, yet you **can** achieve success! Use your coach or a friend to assist you. And check back occasionally for maintenance.
9. **You CAN increase your level of Happiness!** When you shift your thoughts and actions in an intentional way, you will strengthen your “positive emotion muscles” and notice/create more good in your life.

Support

If you wish to accelerate your process, why not work with a coach who has been trained to support your growth and development?

This **HAPPINESS AUDIT** is brought to you by



who wants you to remember that *Happiness is a decision, not an event!*

Visit www.TheExecutiveHappinessCoach.com to find this tool and others to help you grow.

SELF-CARE

- I know what feeds my soul/renews me, and I make time to enjoy that on a regular basis.
- I take good care of myself and don't rely on others to take care of me.
- I get enough sleep at night.
- I exercise regularly and I recognize the energy I gain from it.
- I eat foods that are good for me and I am generally satisfied with my healthy eating choices.
- I make time to have fun in my life.
- I have clearly defined personal core values *(extra point if these are written, and reviewed regularly)*.
- I honor my values; I do not say that one thing is important to me but then behave differently.
- My personal sense of worth is based on who I *am*, not on what I *have* (or do not have).
- I am resilient; when I get knocked down, I know how to get back up, shake off, and try again.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

AUTHENTICITY

- I experience and express my feelings without fear or shame; I rarely hold them inside.
- I am able to identify the source(s) of my feelings.
- Right now I am the happiest I have been in my life thus far.
- I am proud of my heritage and ethnic identity.
- I understand my flaws and weaknesses and accept them; I forgive myself for not being perfect.
- I enjoy being the age I am right now.
- I accept myself unconditionally; I'm happy with me.
- I have a strong moral compass; I am not living any lies.
- I am honest with others and myself.
- I say what needs to be said, even when it feels uncomfortable to do so.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

EMOTIONAL WELL-BEING

- I believe that good eventually wins over evil.
- I don't worry about conforming to other people's expectations about how someone my age or gender should behave.
- I do not live in anger, fear, sadness, or suspicion.
- I hold strong spiritual beliefs; I have faith.
- I rarely feel overwhelmed; when I do I know what to do to get out of that feeling.
- I know how to express my anger appropriately so that I feel heard, yet others do not feel hurt.
- My happiness is independent of my financial status.
- I am comfortable with my own mortality.
- I focus more on what's right in my life versus what's wrong.
- I enjoy healthy competition (I don't need to win).

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

POWER TO CHOOSE

- I realize that every day I have the power to choose the mood I live in.
- I choose my actions rather than blaming others for what I do; I am not a victim.
- I typically view events through a positive lens.
- I rarely dwell on past mistakes.
- I know what happiness feels like, and I recognize and enjoy the time I'm in a happy mood.
- I look for – and usually find – happiness and contentment in everyday tasks and events.
- I focus on what I *can* control or influence rather than on what I cannot control.
- When things go wrong I do not beat myself up.
- I believe that I will find what I expect; therefore, I focus on expecting good and positive outcomes.
- I do not accept television's view of the world.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

INTENTIONAL ACTIONS

- I regularly count my blessings.
- I smile often.
- I volunteer my time.
- I laugh often and well. I am not embarrassed by laughter.
- I invest in my future by regularly putting money away for savings and retirement.
- I have forgiven those who have wronged me; their past actions no longer have a hold on me.
- I often take time to savor happy memories.
- In the last week I have shown appreciation to someone who is important to me.
- I do kind things for others as often as I have the chance, i.e. I practice random acts of kindness. *(extra point if I have said or done something kind for someone else in the past 24 hours).*
- I have a practice or action that I know to take when I am feeling “down” that pulls me back up or re-centers me in a positive way.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

RELATIONSHIPS

- I have at least one close personal relationship/friendship in my life.
- I do not compare the number or quality of my personal relationships to those of others.
- I enjoy being with my family; we get along well; and I maintain positive connections with my family, even those who live far away.
- I know how to let go of relationships that drain me.
- I have a strong support network (personal and professional).
- When it comes to my closest personal relationships, I freely communicate my needs and concerns.
- I am a member of at least one group of people – other than my family – whose interests are similar to mine.
- I know my neighbors; I am engaged in my community.
- Even when I disagree with others, I use respectful words, tone, and body language to express my disagreement.
- I “get” that what makes me happy may not work for others.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

GOALS AND PURPOSE

- I believe my life has purpose and meaning.
- I have a strategy for achieving my life goals.
- My life goals are in alignment; they do not conflict with each other or with my values.
- I feel I am important to someone.
- I set realistic goals for myself; they may stretch me yet they are within reach.
- My goals are flexible; if conditions change I allow my goals to change, too.
- I break large goals into "digestible" chunks so that I can notice my progress.
- I don't let others set my goals for me; I compare myself to my own standards, not to other people's.
- I regularly take time to acknowledge and celebrate my accomplishments.
- I keep my promises.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

PROBLEMS AND TOLERATIONS

- When I notice that I am tolerating something in my life, I take action to reduce/eliminate that toleration.
- When I have conflict with another I share it openly, then work together to get through it.
- I think less about the problems of the past and more about the opportunities of the future.
- When I face a challenge, I generally focus on the reasons I will succeed (rather than what could go wrong).
- I focus on fixing the problem rather than finding blame.
- When bad things happen to me, I look for the life lesson in the experience.
- I accept that life often requires a balancing of mutually exclusive priorities.
- I take responsibility for communicating what I want and need.
- When I am uncomfortable with a situation or a change, I find someone to talk it through with.
- I accept that life changes; I am able to let go of old traditions and embrace new ones.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

ENVIRONMENTS

- All the clothes in my closet or bureau fit me and make me feel good when I wear them.
- I do not equate happiness with “stuff.”
- I am computer literate and I know how to use a computer to stay connected to others.
- I enjoy being in my home; my space is comfortable for me.
- I surround myself with smells and sounds (e.g., music) that I enjoy.
- I am satisfied with what I have.
- I have a pet (dog, cat, fish, horse, iguana, etc.).
- I have adventures (at least occasionally).
- I have routines in my life in which I take comfort.
- I have a hobby or pastime that I enjoy.

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

JOB AND CAREER

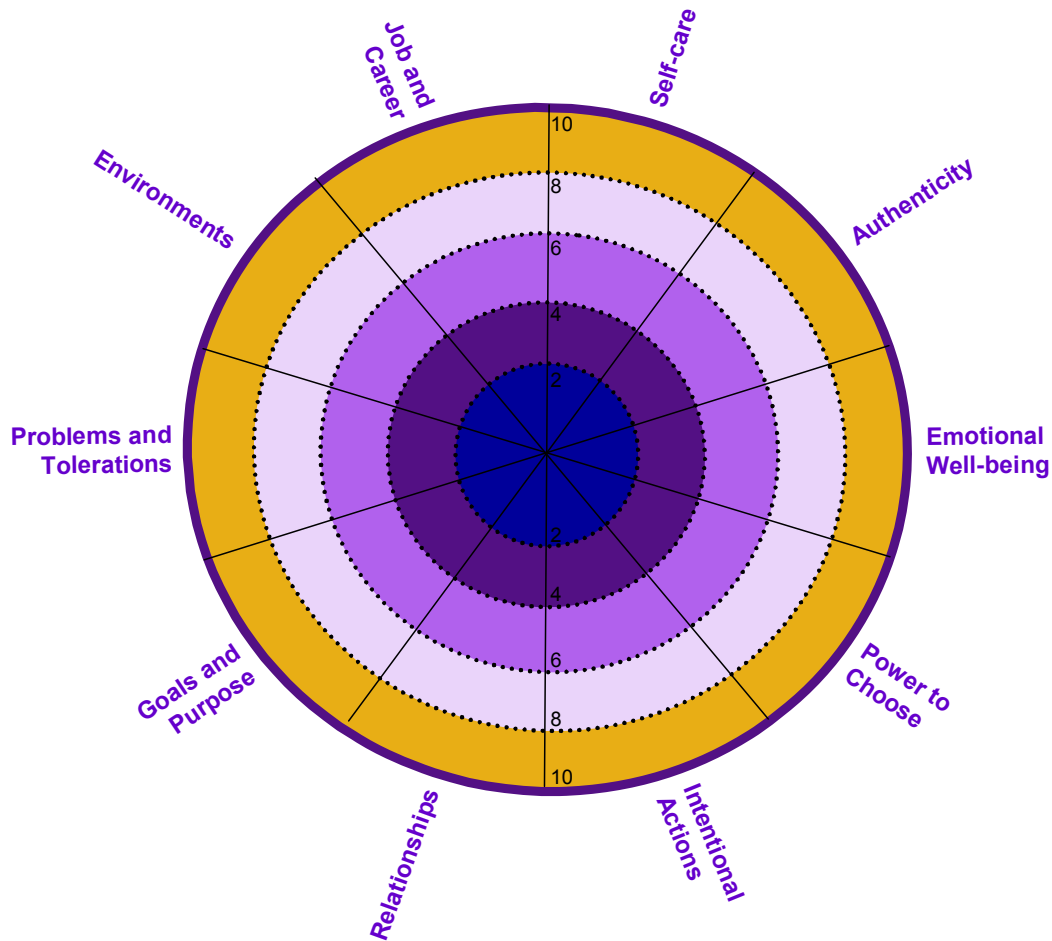
- I consider my work a calling, not a burden; I enjoy what I do to make a living.
- I feel competent at what I do.
- I know what I am good at and I leverage my strengths in what I do.
- My job is not who I *am* – it is simply what I *do*.
- I try to accomplish something every day.
- The job or vocation I work in allows me to do what I do well.
- I finish what I start. I honor my commitments. I care about what I do.
- I never consider someone else’s achievements as evidence I’m doing anything wrong.
- I enjoy learning new things.
- I am an early adopter; when change happens, I try to be “near the front of the line.”

PROGRESS CHART

Date	1	2	3	4	5	6	7	8	9	10

NOTES/GOALS: _____

Happiness Audit ☺ ~ Balance Wheel



You may already know that you want to focus on just one or two areas from this assessment. If that is so, work to refine the goals you set for yourself in that/those areas.

Remember that one goal is, first, to **achieve balance**. Use this Balance Wheel to understand where your investment of time will yield the greatest results.

To use the Balance Wheel:

1. **Bring forward each section score** and plot it on the wheel. **Mark a dot** in each section that corresponds to your score (zero is in the middle, 10 on the outer edge of the wheel).
2. When you **connect the dots**, you will have a current picture of how you are doing across all ten categories.
3. **Where do your “flat spots” occur?** Notice what happens when you make it a priority to bring up your score in that area so your trip through life is not as bumpy!
4. Unsure where to start? Did you feel **resistance** to one or two statements in the audit? That’s probably a good place for you to begin

This **HAPPINESS AUDIT** is brought to you by

The Executive Happiness Coach™
Happiness is a decision, not an event!

Good luck to you!

Jim Smith

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Clean Sweep Program

Welcome

The Clean Sweep Program is a personal diagnostic assessment and a tune-up for your life. The idea behind this popular program is that by strengthening the accompanying 100 items in your life, you will reduce stress, increase your energy and attract better people and opportunities into your life. Over 500,000 individuals have successfully worked with this program since 1992.

Instructions

Start by checking the box preceding any of the 100 statements which are true for you. Then, add up your score in each of the 4 areas:

Physical Environment Well-Being
Money Relationships

Most people initially score in the 30-60 range. Chart your initial score in the area below by coloring in the blocks, starting from the bottom up, in each column.

Then, over the next year, take the assessment several more times and update the chart below. It's very likely that your score will increase naturally. This is because you've begun to think more about these items, just by reading them once.

Support

If you wish to accelerate your process, why not work with a coach who has been trained in this program? This Clean Sweep has been brought to you by Jim Smith, www.TheExecutiveHappinessCoach.com.

The Clean Sweep program is a product of:

Coach University
Your success partner.

Progress Chart

	Environ	Wellness	Money	Relation
25				
24				
23				
22				
21				
20				
19				
18				
17				
16				
15				
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4				
3				
2				
1				

PHYSICAL ENVIRONMENT

- My personal files, papers and receipts are neatly filed.
- My car is in excellent condition.
- My home is neat and clean.
- My appliances, machinery and equipment work well.
- My clothes are all pressed, clean and flatter me.
- My plants and animals are healthy.
- My bed/bedroom lets me sleep extremely well.
- I live in a home/apartment that I love.
- I surround myself with beautiful things.
- I live in the geographic area of my choice.
- There is ample and healthy lighting around me.
- I consistently have enough time, space, freedom in my life.
- I am not damaged by my environment.
- I am not tolerating anything in my home/work environment.
- My work environment is productive and inspiring.
- I recycle.
- I use non ozone-depleting products.
- My hair is the way I want it.
- I surround myself with music I love.
- My bed is made daily.
- I don't injure myself, fall or bump into things.
- People feel comfortable in my home.
- I drink purified water.
- I have nothing unnecessary at home/in storage.
- I am consistently early or easily on time.

_____ **Number of True (25 max)**

WELL-BEING

- I rarely use caffeine.
- I rarely eat sugar.
- I rarely watch television.
- I rarely drink alcohol.
- My teeth/gums are healthy. (Seen dentist in last 6 months)
- My cholesterol count is healthful.
- My blood pressure is healthful.
- I have had a complete physical exam in the past 3 years.
- I do not smoke tobacco or other substances.
- I do not use illegal drugs or misuse prescribed medications.
- I have had a complete eye exam within the past two years.
- My weight is within my ideal range.
- My nails are healthy and look good.
- I don't rush or use adrenaline to get the job done.
- I have a rewarding life beyond my work or profession.
- I have something to look forward to virtually every day.
- I have no habits which I find to be unacceptable.
- I am aware of the physical or emotional problems or conditions I have, and I am now fully taking care of all of them.
- I consistently take evenings, weekends and holidays.
- I have been tested for the AIDS antibody.
- I use well-made sunglasses.
- I do not suffer.
- I floss daily.
- I walk or exercise at least three times per week.
- I hear well.

_____ **Number of True (25 max)**

MONEY

- I currently save at least 10% of my income.
- I pay my bills on time, virtually always.
- My income source/revenue base is stable and predictable.
- I know how much I must have to be financially independent.
- I have returned or made-good-on any money I borrowed.
- I have written agreements and am current with payments to individuals or companies to whom I owe money.
- I have 6 months' living expenses in a money market account.
- I live on a weekly budget that allows me to save and not suffer.
- All my tax returns have been filed and all taxes are paid.
- I currently live well, within my means.
- I have excellent medical insurance.
- My assets (car, home, possessions) are well-insured.
- I have a financial plan for the next year.
- I have no legal clouds hanging over me.
- My will is up-to-date and accurate.
- Any parking tickets, alimony or child support are paid.
- My investments do not keep me awake at night.
- I know how much I am worth.
- I am on a financially rewarding career/business track.
- My earnings are commensurate with the quality of work I do.
- I have no "loose ends" at work.
- I am getting all of the professional/career development I want.
- I rarely miss work due to illness.
- I am putting aside enough money to retire early.
- My earnings outpace inflation, consistently.

_____ **Number of True (25 max)**

RELATIONSHIPS

- I have told my parents, in the last 3 months, I love them.
- I get along well with my sibling(s).
- I get along well with my co-workers/clients.
- I get along well with my manager/staff.
- There is no one who I would dread or feel uncomfortable "running across" (in the street, at an airport or party)
- I put people first and results second.
- I have let go of the relationships which drag me down.
- I have communicated or attempted to communicate with everyone who I have damaged, injured or seriously upset.
- I do not gossip or talk about others.
- I have a bank of friends/family who love and appreciate me for who I am, more than just what I do for them.
- I tell people how they can satisfy me.
- I am fully caught up with letters and calls.
- I always tell the truth, no matter what.
- I receive enough love from people around me to feel good.
- I have fully forgiven those people who have hurt/damaged me, intentional or not.
- I am a person of his/her word; people can count on me.
- I quickly correct any misunderstandings when they occur.
- I live life on my terms, not the rules/preferences of others.
- I am complete with past loves or spouses.
- I know my wants and needs and get them taken care of.
- I do not judge or criticize others.
- I do not "take personally" the things that people say to me.
- I have a best friend or soul-mate.
- I make requests rather than complain.
- I spend time with people who don't try to change me.

_____ **Number of True (25 max)**

_____ **Grand Total (100 max)**

This assessment is brought to you by:



Happiness is a decision, not an event!

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Core Values Exercise



Use this list of over 150 values words to help identify the terms that best resonate for you. You may add your own words at the end of the list.

Part 1: Identify, Define, and Rank your Core Values

1. Begin by checking off the words that best represent *principles, standards, or qualities* you consider worthwhile or desirable – those you believe to be important in your life.
2. If the initial pass yields a number greater than 7 or 8, do a second pass. Notice where you have chosen words that support a similar concept. Decide which word in those groupings BEST captures what you value (e.g. honesty, integrity, ethics: which best captures the other two for you?).
3. Once you have narrowed your list to 7-8, pull them to the list below.
4. Now, rank them in order of importance. In other words, when you encounter a conflict in values (it happens!), which will you honor OVER another?
If you get stuck around the ranking, try this first: for each of your "finalists," write out a full sentence or two of definition – YOUR definition of that value. Once you have defined each word fully, return to ranking them.
5. The value that rises up the most often you should rank #1, the next #2, and so on.

Priority/Rank	My Finalists

Part 2: Integrate your Values into your life so you live them fully

- Post your values where you will see them daily. When you know your core values by heart, you 'own' them and can use them in stress situations.
- Use your values as a Filter for all decisions that impact you personally. Notice when you are making a decision that is out of alignment with one of your values. That internal "tug" you feel? That might be your conscience saying, "hey, what's up with that?"



- | | | |
|---|--|--|
| <input type="checkbox"/> Acceptance | <input type="checkbox"/> Awareness | <input type="checkbox"/> Consciousness |
| <input type="checkbox"/> Accomplishment | <input type="checkbox"/> Beauty | <input type="checkbox"/> Consideration |
| <input type="checkbox"/> Achievement | <input type="checkbox"/> Being | <input type="checkbox"/> Constancy |
| <input type="checkbox"/> Acquisition | <input type="checkbox"/> Bliss | <input type="checkbox"/> Contentment |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Calm | <input type="checkbox"/> Contribution |
| <input type="checkbox"/> Alignment | <input type="checkbox"/> Charity | <input type="checkbox"/> Cooperation |
| <input type="checkbox"/> Altruism | <input type="checkbox"/> Coach | <input type="checkbox"/> Courage |
| <input type="checkbox"/> Amusement | <input type="checkbox"/> Community | <input type="checkbox"/> Create |
| <input type="checkbox"/> Assistance | <input type="checkbox"/> Compassion | <input type="checkbox"/> Creativity |
| <input type="checkbox"/> Attractiveness | <input type="checkbox"/> Comprehending | <input type="checkbox"/> Danger |
| <input type="checkbox"/> Authenticity | <input type="checkbox"/> Connection | <input type="checkbox"/> Dare |

- | | | |
|---|--|---|
| <input type="checkbox"/> Delight | <input type="checkbox"/> Honor | <input type="checkbox"/> Radiance |
| <input type="checkbox"/> Dependability | <input type="checkbox"/> Hope | <input type="checkbox"/> Recognition |
| <input type="checkbox"/> Detection | <input type="checkbox"/> Humility | <input type="checkbox"/> Relatedness |
| <input type="checkbox"/> Dignity | <input type="checkbox"/> Imagination | <input type="checkbox"/> Relationships |
| <input type="checkbox"/> Direct | <input type="checkbox"/> Improvement | <input type="checkbox"/> Relaxation |
| <input type="checkbox"/> Discovery | <input type="checkbox"/> Independence | <input type="checkbox"/> Reliability |
| <input type="checkbox"/> Discrimination | <input type="checkbox"/> Influence | <input type="checkbox"/> Religious/Religion |
| <input type="checkbox"/> Distinguish | <input type="checkbox"/> Information | <input type="checkbox"/> Resourcefulness |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Inner peace | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Economic Security | <input type="checkbox"/> Innovation | <input type="checkbox"/> Responsibility |
| <input type="checkbox"/> Education | <input type="checkbox"/> Inspiration | <input type="checkbox"/> Responsiveness |
| <input type="checkbox"/> Effectiveness | <input type="checkbox"/> Instruction | <input type="checkbox"/> Risk |
| <input type="checkbox"/> Elegance | <input type="checkbox"/> Integrity | <input type="checkbox"/> Safety |
| <input type="checkbox"/> Emotional Well-being | <input type="checkbox"/> Intelligence | <input type="checkbox"/> Schooling |
| <input type="checkbox"/> Empathy | <input type="checkbox"/> Inventiveness | <input type="checkbox"/> Self-awareness |
| <input type="checkbox"/> Encourage | <input type="checkbox"/> Joy | <input type="checkbox"/> Self-worth |
| <input type="checkbox"/> Encouragement | <input type="checkbox"/> Justice | <input type="checkbox"/> Sensations |
| <input type="checkbox"/> Energy | <input type="checkbox"/> Kindness | <input type="checkbox"/> Sensuality |
| <input type="checkbox"/> Enlightenment | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Serenity |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Laughter | <input type="checkbox"/> Service |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Leadership | <input type="checkbox"/> Simplicity |
| <input type="checkbox"/> Equality | <input type="checkbox"/> Learning | <input type="checkbox"/> Spirituality |
| <input type="checkbox"/> Ethics/Ethical | <input type="checkbox"/> Love | <input type="checkbox"/> Stability |
| <input type="checkbox"/> Excellence | <input type="checkbox"/> Loyalty | <input type="checkbox"/> Stimulation |
| <input type="checkbox"/> Experience | <input type="checkbox"/> Magnificence | <input type="checkbox"/> Strength |
| <input type="checkbox"/> Experiment | <input type="checkbox"/> Mastery | <input type="checkbox"/> Strengthen |
| <input type="checkbox"/> Expertise | <input type="checkbox"/> Merriment | <input type="checkbox"/> Success |
| <input type="checkbox"/> Explain | <input type="checkbox"/> Nobility | <input type="checkbox"/> Superiority |
| <input type="checkbox"/> Exquisiteness | <input type="checkbox"/> Nurturance | <input type="checkbox"/> Support |
| <input type="checkbox"/> Facilitation | <input type="checkbox"/> Observation | <input type="checkbox"/> Teaching |
| <input type="checkbox"/> Fairness | <input type="checkbox"/> Order | <input type="checkbox"/> Tenderness |
| <input type="checkbox"/> Faith | <input type="checkbox"/> Organization | <input type="checkbox"/> Touch |
| <input type="checkbox"/> Fame | <input type="checkbox"/> Originality | <input type="checkbox"/> Tranquility |
| <input type="checkbox"/> Family | <input type="checkbox"/> Peace | <input type="checkbox"/> Trust |
| <input type="checkbox"/> Feeling good | <input type="checkbox"/> Peacefulness | <input type="checkbox"/> Truth |
| <input type="checkbox"/> Fitness | <input type="checkbox"/> Perception | <input type="checkbox"/> Truthfulness |
| <input type="checkbox"/> Freedom | <input type="checkbox"/> Personal | <input type="checkbox"/> Understanding |
| <input type="checkbox"/> Friendship | <input type="checkbox"/> Development | <input type="checkbox"/> Victory |
| <input type="checkbox"/> Fun | <input type="checkbox"/> Play | <input type="checkbox"/> Vision |
| <input type="checkbox"/> Generosity | <input type="checkbox"/> Pleasure | <input type="checkbox"/> Wealth |
| <input type="checkbox"/> Grace | <input type="checkbox"/> Positive attitude | <input type="checkbox"/> Wholeness |
| <input type="checkbox"/> Gratitude | <input type="checkbox"/> Power | <input type="checkbox"/> Winning |
| <input type="checkbox"/> Guidance | <input type="checkbox"/> Preparation | <input type="checkbox"/> Wisdom |
| <input type="checkbox"/> Happiness | <input type="checkbox"/> Presence | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Harmony | <input type="checkbox"/> Proficiency | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Health | <input type="checkbox"/> Provider | |
| <input type="checkbox"/> Honesty | <input type="checkbox"/> Quest | |

Quiz: Be Responsible About Money

There are several guidelines that will help you avoid money issues. Quiz yourself on the issues below. If you have more than two "No's," you have opportunities to improve your personal relationship with money.

- Yes No I have written personal goals that will help increase my net worth 5-15 percent annually.
- Yes No I evaluate my Game Plan periodically e.g. I review my financial situation at least every six months, and adjust as necessary to meet my plan.
- Yes No I am able to talk openly and have honest and reality-based communication about money with the people in my life who can support me (e.g. advisors, trusted friends, some family).
- Yes No I know how to constructively deal with the pain that goes with problem-solving financial issues. I don't avoid it.
- Yes No I am clear with myself about the limits limit on the amount of money I can spend.
- Yes No I exercise self-discipline and delay immediate gratification.
- Yes No I am a proactive responsible adult
- Yes No I live below my means.
- Yes No I "pay myself first," whereby I am able to fund monthly all of my financial goals like payables.
- Yes No I know where my money goes – I either keep a budget and manage to that, or I track my expenses and have a good feel for where I spend and on what.

Remember this: for the vast majority of people who have financial problems, it's less about 'how much I make' than it is about honoring priorities, paying attention, and having support. In other words, it's not about the money, it's about your relationship with the money!

Tough Questions About MONEY

Answer these questions about your financial situation. If the responses are not in sync with what you want them to be, what are you willing to do and by when to get yourself into the situation you desire? Here is where you might want to use your **ACTION ITEMS SHEET** which is at the end of this package.

HOW WOULD I DEFINE MY CURRENT FINANCIAL SITUATION?

HOW STABLE WOULD I DEFINE MY INCOME STREAM?

DO I LIVE WITHIN, AT, OR BEYOND MY MEANS?

WHAT DO I NEED TO DO DIFFERENTLY TO LIVE WITHIN MY MEANS?

AM I A NATURAL SAVER OR HABITUAL SPENDER?

HOW MUCH CREDIT CARD DEBT AM I CARRYING? WHAT PERCENT OF MY TOTAL CREDIT LIMIT DOES THAT CONSTITUTE?

HOW MUCH MONEY IS ENOUGH FOR ME?

WHAT ACTIONS COULD I TAKE THAT WOULD INCREASE MY SAVINGS?

WHAT MISTAKES DO I SEEM TO MAKE WITH MONEY?

HOW MUCH OF A PRIORITY IS MAKING MORE MONEY?

WHAT HOLDS ME BACK FINANCIALLY?

Estate Planning Checklist -- "Where Are You Today?"

Instructions: Check off what applies to YOU!

Col 1	Col 2	
<input type="checkbox"/> No	<input type="checkbox"/> Yes	I live from paycheck to paycheck.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have separate checking accounts for both personal and business (if appl).
<input type="checkbox"/> No	<input type="checkbox"/> Yes	My income is not determined for the coming year.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I pay my taxes on time.
<input type="checkbox"/> No	<input type="checkbox"/> Yes	I would not be able to cover three to five months' living expenses in the event of an emergency.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have done strategic financial planning.
<input type="checkbox"/> No	<input type="checkbox"/> Yes	I have no idea what my current financial situation is.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I save and invest money on a monthly basis.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a good knowledge of how to invest my money (or have an advisor who does).
<input type="checkbox"/> No	<input type="checkbox"/> Yes	I am afraid to invest in stocks/equities.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a knowledge or understanding of the following terms: time horizon, risk to tolerance, investment objective, and asset allocation.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have adequately prepared for my retirement (if >10yrs, I am on right path).
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have an IRA.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a Qualified Retirement Plan/SERP (if I own a business).
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I contribute to the retirement plan annually.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I know if I have provided ample protection for my family and assets (e.g. home/car).
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have made plans or strategy in the event of my: <input type="checkbox"/> disability <input type="checkbox"/> death <input type="checkbox"/> retirement
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have disability insurance.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I know if I have enough life insurance.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The beneficiary of my life insurance policy is current (who I want it to be now).
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have an Irrevocable Life Insurance Trust (if I have children).
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a will.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a Durable Power of Attorney.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have a Living Will
<input type="checkbox"/> Yes	<input type="checkbox"/> No	(esp if have children) those named as executor of my will and/or guardian(s) of my children are currently themselves in good health and capable
<input type="checkbox"/> Yes	<input type="checkbox"/> No	My will (and trust, if applicable) have been reviewed every two years.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I have sought the advice of a fee-only financial adviser.
___	___	TOTAL EACH COLUMN

SCORING:

11 or more checkmarks in Column 2: You are in the **RED ZONE**. Red signifies DANGER! You have major work ahead to avert the high risk of financial disaster that may loom in your future. Don't procrastinate! Get help immediately.

7-10 checkmarks in Col 2: You are in the **YELLOW ZONE**. Put on the brakes and take a close look at what you are doing. You are not in the disaster zone yet, but your lack of attention could set you up for future financial failure. Examine your habits, and consider getting some help soon.

4-6 checkmarks in Col 2: You are in the **GREEN ZONE**. You are fairly savvy when it comes to your habits to prepare for the unexpected. But don't let your good habits slide. Get a good advisor, and stick to your plan!

Upgrades to Make

When we upgrade, we raise our standards and we upgrade our chances for greater success and peace of mind. Take time to consider what you feel you need or want to upgrade. Committing to an upgrade does not mean it must happen this year, but once you've written it down, that change is far more likely to occur because you've declared it as a goal.

Stop and Write

- What are the upgrades you wish to make in the quality of your life?
- What are the upgrades you wish to make in your financial situation?
- What are the upgrades you wish to make in your communication skills?
- What are the upgrades you wish to make on the inside? (e.g. How you think about yourself?)
- What are the upgrades you wish to make in your family/home life?
- What are the upgrades you wish to make in your personal character?
- What are the upgrades you wish to make in your love life?
- What are the upgrades you wish to make in your job/career/work?
- What are the upgrades you wish to make in your professional skills?
- What are the upgrades you wish to make in your home, inside and out?

A Look Ahead – Rolling 20 years+

We tend to become very caught up in what is happening RIGHT NOW, and we sometimes forget that this year was just one small part of our life. This exercise will help you keep things in perspective.

Instructions: Look ahead. First, list significant events that you KNOW will be happening, like important anniversaries/birthdays for yourself, family, or kids; school starts, school graduations, etc. Next, put a stake in the ground for things you WANT to happen, e.g. take a cruise for your 40th birthday, Disney World Trip, targeted retirement dates, and so on.

By doing this you are creating a combination Reality Check and Wish List. Laying out the next couple of decades will help you see where you'll experience financial needs; where you'll have busy years and where you'll have time to relax a bit; and it will give you targets to shoot for beyond just next week.

Year	Event(s)
Current	
Next Yr	
Year 2	
Year 3	
Year 4	
Year 5	
Year 6	
Year 7	
Year 8	
Year 9	
Year 10	
Year 11	
Year 12	
Year 13	
Year 14	
Year 15	
Year 16	
Year 17	
Year 18	
Year 19	
Year 20	

Top Tips for Better Resolutions

Use this checklist to help you create better action plans and goals

- 1. Make resolutions throughout the year, rather than waiting for New Year's.**
That way you're likely to set goals that are really meaningful and compelling, rather than setting goals for the sake of a holiday ritual.
- 2. Eliminate recurring resolutions.**
Anything you've set as a goal before and failed at probably isn't going to work any better this time. Drop it or redefine it to make it more doable and attractive.
- 3. Align resolutions with values.**
When your goals are in sync with your written core values, success comes more effortlessly.
- 4. Cross 'shoulds' off your list.**
Shoulds' and 'musts' are actually other people's goals, not yours.
- 5. Make resolutions specific and measurable.**
If there's no clear finish line, you won't be able to know if you've succeeded. Vague goals create anxiety and drain energy.
- 6. Identify what might stop you from succeeding.**
Ask yourself, "what roadblocks might occur for this goal?" Anticipating possible obstacles means they are less likely to derail you when you encounter them. Some will even disappear just by being named.
- 7. Focus on what you want; not what you don't want.**
Sounds basic, right? You might be surprised. Energy follows thought, so you attract what you focus on. Phrase goals to express the positive, not the negative, side of what you want.
- 8. Make your physical environment do the work.**
What needs to be different? If you want to watch less TV, put it in storage or a back room. If you want to curb credit card spending, keep them in a safe deposit box for emergency use only. If you want to eat healthier foods, make sure that's all you have in your house. You get the idea.
- 9. Visualize the benefits of your goal.**
What does your "picture" look like? Be specific and clear to yourself about why the outcome is important and worth attaining. Imagine how good it will feel. Relish the details.
- 10. Get support.**
What will support look like? Change is easier and more fun when you have someone who loves you to help.

Action Plan – Instructions

Now that you’ve completed all your conversation and planning, you want to make sure that it means something.

- Identify the top ten or so commitments you’ve made, and bring them forward to a single page.
- For each item, list the
 - ~WHAT (the action or activity),
 - ~the WHO (is responsible), and
 - ~the WHEN (the deadline or date by which it will be completed. If the action is ongoing, you might list the frequency, e.g. Daily, or every Sunday, etc)
- If an action will require multiple steps, it’s a Project and it requires its own Action Plan sheet, with one line for each step of the project.

Examples, single items:

WHAT	WHO	WHEN
Walk for exercise and to manage my stress	Me	Five days each week after dinner
Rearrange the Living Room	My brother and I	By April 15 th
Schedule a weekend in Chicago w/ Sally	Sally, Me Mom	Coord w/ Sally. Weekend when Mom can take the kids

Example, Project:

Project, Situation, Issue: Buy a new computer

WHAT	WHO	WHEN
Identify what I want in my new desktop	John (my techie friend)	By February 15 th
Research options and prices	Me	By March 15 th
Save \$ to be able to buy computer, put \$50/pay into savings account	Me	Starting Jan 1, thru April
Purchase computer and set it up	Me and John	May 1 or as soon as enough \$\$ saved and John is available to help.

