

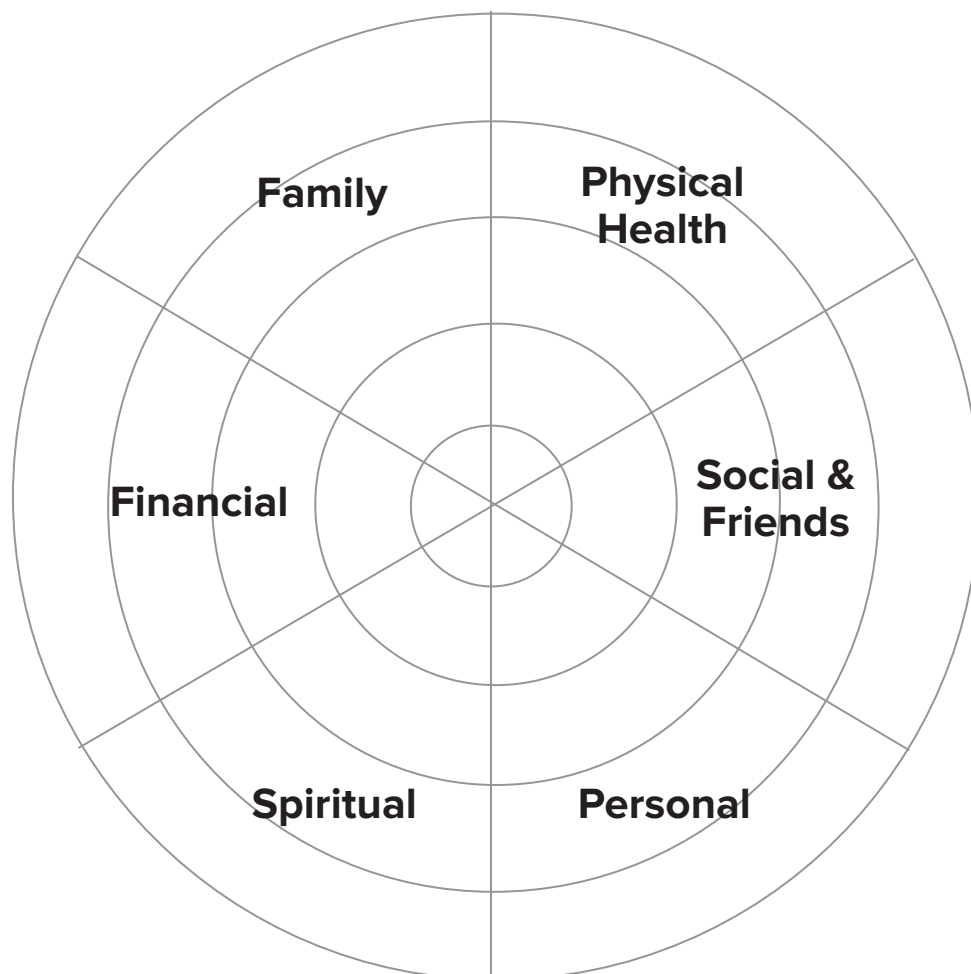
Your Wheel of Life

How balanced really is your life?

For each area of your life, shade the segments based on how well you feel you are doing in terms of your Ideal Life. For example, take the segment titled 'financial'. If you feel you are doing poorly with your finances, shade one segment and if you are doing well, shade all five or any number of segments in between.

Complete each area in turn and then consider how 'balanced' your wheel is.

The areas where there is imbalance, may be areas where you might consider new goals to improve your balance.



The power of dreaming

We all need something to look forward to and this is where a Dream List comes in. Some people call it a 'bucket list' and it is used to capture whatever dreams and desires come to mind. The idea is to write down everything you have ever wanted to have, do or be.

Dream List		
Date	Dream List Item	Area of Life

Your values drive your decisions

Step 1: Identifying your core values

This exercise should be done solo, when there is time to reflect and think. Looking at the word cloud below, take time to reflect on the words – making sure you consider each word regardless of its size.

As you do this, some words will resonate more strongly than others and you will begin to narrow down your preferences. Once you have narrowed down the four words that resonate most strongly, underline them.



Your values drive your decisions

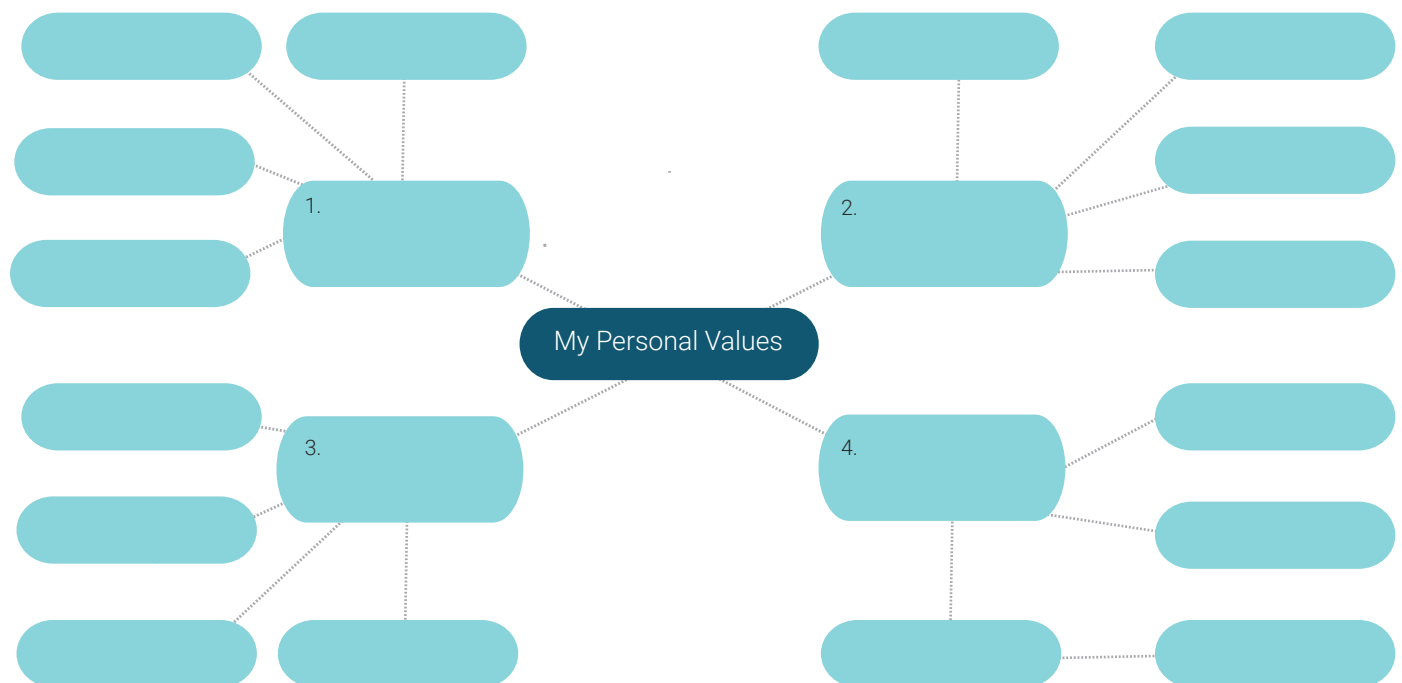
Step 2: Identifying your emotional pay-offs

Now transfer your chosen words into the numbered boxes in the Values Map below. Once you have done this, for each of the values you have chosen, ask yourself the question: 'What's important about _____ to me?'

Let's say you have chosen Family as your number one value. The question will be, 'What's important about family to me?' Write in the empty spaces the answers that come to mind. In completing this exercise, it is important to think deeply and consider what is important to you, personally.

For example, under Family, you might write, 'Providing the best education I can for my children'. So now ask yourself, 'What's important about providing the best education I can for my children to me, personally?' You might answer something like, 'So I can be the best provider I can be' or 'Enjoy the satisfaction of seeing my children do well'.

Having completed the pay-offs for the first value, continue until you have completed them all.



Your values drive your decisions

Step 3: Comparing notes

Once you have completed your Values Map, sit back and take in the results. We find that people really enjoy the opportunity to reflect and think about the things that are important to them.

If you have a partner, it's now time to compare notes with them. What were the similarities and differences? How do these differences play out on a day-to-day basis as you live your lives together?

Step 4: Reflection

The final step is to reflect on the work you have done so far. As you look at the values you have documented, ask yourself the following question: 'If I lived a life in line with my values, what would my reflection be?' At this point you are likely to respond with something like, 'Absolute satisfaction' or 'I could die with a smile on my face'. It is when you have a response like this that we know you have really connected with your deepest and most important values.

The Values Map below provides a completed example to illustrate what you will end up with when the exercise is finished.



Creating inspiring goals

The future is coming regardless of whether you plan for it or not. Setting great goals will enable you to have the future you want, not the future you will get by default by drifting along. There is a very clear process you should follow in setting goals. Each step is as important as the others. As you set your goals, follow this process, leaving nothing out.

Step 1 | Give it a name

The name of your goal is important, particularly when you are setting the goal as a couple. The name of the goal becomes a rallying call to action. If it really means something to you, you are more likely to pursue it.

Step 2 | Describe it clearly

Give the goal a description that makes it completely clear what you are seeking to achieve. A clear description brings the goal to life.

Step 3 | Quantify it

There's no point in having a tangible goal if it can't be quantified and measured. At this point don't worry if it is achievable or not, just put a number on it. This gives you everything you need to calculate the capital required to fund the goal.

Step 4 | Give it a date

Putting a date on each goal sets the time frame for when it will be achieved. I liken this to setting the clock ticking. From this point, each day you delay acting reduces the probability of you achieving the desired outcome. It is best to use a meaningful date such as a birthday or an anniversary, just so you have something to look forward to once you achieve it!

Step 5 | Assess the benefits

This is a test of how committed you are to taking action. Ask yourself the following question: 'Let's say I have achieved the goal – what would I be thinking and feeling having achieved it?' If the answer is something like, 'Awesome' or 'I'll feel great' or 'relief', then you know you are on the right track. If you don't have a reaction like this, you may just be going through the motions.

Step 6 | Is it worth the effort?

The final step is to ask yourself whether the goal is worth the effort required to achieve it. You are really asking yourself, 'Is this juice worth the squeeze?' If the answer is 'yes', then you are ready to implement. If the answer is 'no', then you need to head back to the drawing board.

Step 7 | Periodically review your progress

Periodic review of your progress will enable you to keep score and make the course corrections you need to remain on track.

Goals worksheet

Goal name:

Goal description:

Money required to achieve goal:

Target date:

What are the benefits of achieving this goal?

Is it worth the effort and what's standing in the way?