|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **(Book Figure 2.1)** | | |  |  |  |  |  | |  |  |
| **10 Year Life Vision** | | | | | | | | | | |
|  |  |  |  |  |  |  |  | |  |  |
| 2021 Mantra: "\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_" | | | | | | | | | | |
|  |  |  |  |  |  |  |  | |  |  |
|  |  | **Values:** |  | **#1** | **#2** | **#3** | **#4** | | **#5** |  |
|  |  | Family Member #1 | |  |  |  |  | |  |  |
|  |  | Family Member #2 | | N/A |  |  |  | |  |  |
|  |  | Side Hustle/Business | | N/A |  |  |  | |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  | **Financial** | **Type** | **Current State** | | **5 Year State** | | | **10 Year State** | |
|  | **1** | Net Worth | Metric | -$15,000 | | $200,000 | | | $600,000 | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
|  |  | **Health** |  |  | |  | | |  | |
|  | **1** |  |  |  | |  | | |  | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
|  |  | **Spiritual** |  |  | |  | | |  | |
|  | **1** |  |  |  | |  | | |  | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
|  |  | **Relationships** |  |  | |  | | |  | |
|  | **1** |  |  |  | |  | | |  | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
|  |  | **Recreation** |  |  | |  | | |  | |
|  | **1** |  |  |  | |  | | |  | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
|  |  | **Other/Misc.** |  |  | |  | | |  | |
|  | **1** |  |  |  | |  | | |  | |
|  | **2** |  |  |  | |  | | |  | |
|  | **3** |  |  |  | |  | | |  | |
|  | **4** |  |  |  | |  | | |  | |
| **EXAMPLE (Figure 2.1)** | | |  |  |  |  | |  |  |  |
| **5 & 10 Year Life Vision** | | | | | | | | | | |
|  |  |  |  |  |  |  | |  |  |  |
| 2021 Mantra: "I Can Learn Anything If I work Hard Enough" | | | | | | | | | | |
|  |  |  |  |  |  |  | |  |  |  |
|  |  | **Values:** |  | **#1** | **#2** | **#3** | | **#4** | **#5** |  |
|  |  | Family Member #1 | | **Integrity** | Challenge | Passion | | Fun | Spiritual |  |
|  |  | Family Member #2 | | N/A |  |  | |  |  |  |
|  |  | Side Hustle/Business | | N/A |  |  | |  |  |  |
|  |  |  |  |  |  |  | |  |  |  |
|  |  |  |  |  |  |  | |  |  |  |
|  |  | **Financial** | **Type** | **Current State** | | **5 Year State** | | | **10 Year State** | |
|  | **1** | Net Worth | Metric | -$15,000 | | $200,000 | | | $600,000 | |
|  | **2** | Annual Job Income | Metric | $60,000 | | $85,000 | | | 50,000 (20 hrs/week) | |
|  | **3** | Side Hustle Income | Metric | 0 | | $30K ($10K Passive) | | | $100K ($50K Passive) | |
|  | **4** | Quarterly Budget Review | Activity | No | | YES | | | YES | |
|  |  | **Health** |  |  | |  | | |  | |
|  | **1** | Exercising Habits | Activity | Run 2/month | | Run 3/week | | | Run 5/week | |
|  | **2** | Happy & Healthy | Feeling | Feeling Unhealthy | | Feel Healthy | | | Excellent Health | |
|  | **3** | 1 Mile Run Time | Metric | 9 Minutes | | 7:30 | | | 6:30 | |
|  | **4** | Mental | Activity | Meditate 1/Week | | Meditate + Therapy | | | Meditate Daily | |
|  |  | **Spiritual** |  |  | |  | | |  | |
|  | **1** | Religious Service | Activity | Attending Monthly | | Attend Weekly | | | Attend Weekly | |
|  | **2** | Leadership Role | Activity | N/A | | Join 2 Committees | | | Exec Leadership Role | |
|  | **3** | Connection with God | Feeling | Distant/Low | | Growing/Good | | | Intimate/Strong | |
|  | **4** | Charitable Donations | Metric | $1,000/Year | | $5,000/Year | | | $10,000/Year | |
|  |  | **Relationships** |  |  | |  | | |  | |
|  | **1** | Girlfriend Date Night | Activity | Weekly | | Married! 2 Nights/W | | | 5 Nights/Week!!! | |
|  | **2** | Time with Children | Activity | N/A | | N/A | | | 2-3 Hours/Daily (Min) | |
|  | **3** | Create New Friendships | Metric | 0 / Year | | 2/Year | | | 2/Year | |
|  | **4** | Feeling of Family Unity | Feeling | N/A | | High Unity | | | High Unity | |
|  |  | **Recreation** |  |  | |  | | |  | |
|  | **1** | Vacations Per Year | Activity | 1-2 Weeks/Year | | 3 Full Weeks/Year | | | 3 Months/Year | |
|  | **2** | Learn Guitar | Activity | N/A | | Play Basic Chords | | | Play Basic Rock Songs | |
|  | **3** | Golf Handicap <10 | Metric | Handicap = 20 | | Handicap = 20 | | | Handicap = 10 | |
|  | **4** | General Happiness | Feeling | OK | | Feel Fulfilled | | | Feel Joy & Fulfilled | |
|  |  | **Other/Misc.** |  |  | |  | | |  | |
|  | **1** | Public Speaking | Activity | 2 Events/Year | | 4 Events/Year | | | 1 Event/Month | |
|  | **2** | Home Project | Activity | N/A | | Redo Bathroom | | | Build New Garage | |
|  | **3** | Buy Lakehouse | Activity | N/A | | N/A | | | Buy 3 Bed Lakehouse | |
|  | **4** |  |  |  | |  | | |  | |