

Life Vision Worksheet

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					

Life Vision Worksheet

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	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					

Developing A Holistic Life Vision:

It is imperative to understand how your side hustle can be a tool to manifest the life you are looking to create in both a holistic and synergistic way, not as an independent rogue agent that will just randomly kick out some income occasionally. Life is more complex than this! Thinking you are going to take your off hours to build a substantial business in a vacuum that won't impact your family, health or relationships is both naive and foolish.

When thinking about your Life Vision, people have a propensity to jump immediately to their income and career or business goals. Do realize that your financial goals and being an entrepreneur are just a portion of that vision. Your vision should include all the major components of life. What is the point of being a hot shot entrepreneur if you have low quality relationships or struggle to live a truly fulfilled life? This is a common trap and why it is so critical you know why you want to build a side hustle to begin with! We need to decide how our side hustle affects, enhances, and influences all aspects of our lives, the major ones being:

1. Spiritual
2. Financial
3. Relationships
4. Health
5. Recreation

By combining these aspects of our life into a *single vision* we are less likely to create success in one area and become negligent in others. Every year, the president of the United States addresses the nation and delivers a "State of the Union Address." No politics attached of course, but what would you like your future "State of the Human" address sound like? The "State of Craig or Carrie" address would not just include how much money we make or have, but what is our overall *state of being*. We have also heard this referred to as your *Desired Future State* or *Future Desired State*. Essentially referring to your state of mind or state of being.

Your Life Visions should be the equivalent of delivering a "State of the Human" address. What does happiness look and *feel* like? What would you want to have accomplished? How would you visualize your relationships at an optimal level? What are you known for? How do you want to live? How can you better act in alignment with your values?

When we challenge people to put this type of 5 and 10 year vision together many are *floored*. **Most people have never been pushed to engage in activity this comprehensive or important.** As a result, they often perform poorly and come back with very vague statements such as:

1. "I want to be financially independent."
2. "I want to have a lot of flexibility to travel."
3. "I want to have a great relationship with my husband."
4. "I want to help my parents."
5. "I want to be strong in my faith."

These are SH** Goals. Better than *no* goals, but not by much.

If someone shares with us that they want to travel to every country on the planet, but they are casual about it and they don't have a plan (or a passport), we wouldn't believe them. Would you? Even more important, do you think they believe themselves?

Remember the 5 characteristics about your future life we had you share in the last section? This is about as deep as most people ever go and as a result, they never develop a clear plan. *Its difficult to execute on plan that doesn't exist.*

Your vision and goals need to be *specific*. There are hundreds of books written on goal setting but for the purpose of our conversation we recommend that each of the 5 categories of your vision include the following:

1. Quantifiable metrics with dates (For those items that allow)
2. Activity goals
3. Values, characteristics, feelings, or visuals that express your desired future state.

As an example, it may be hard to have a quantifiable spiritual goal. What we can recommend is to have an *activity* goal. Below are stronger examples of goal setting:

1. Original Goal: "I want to be financially independent."

Specific Goal: Achieve financial independence by Age 40. This requires:

- \$50K of annual passive income, from at least 2 different sources (Metric)
- \$500K in savings, 40K or other. (Metric)
- No major financial commitments or debt with home paid off in full (Metric)
- Carry a strong feeling of financial security (Feeling)

2. Original Goal: "I want to have a lot of flexibility to travel."

Specific Goal: I want to be able to travel 4 months out of the year by 2023.

- Need a work from home career or 6-8 month project/ contract work. (Metric)
- Have a partner who values traveling and does not want to own a home or have children for several years. (Metric)
- Need \$20,000 in liquid savings. (Metric)
- Want the feeling of not being tied down or restricted (Feeling)

3. Original Goal: "I want to help my parents."

Specific Goal: "I want my parents to be able to live with my family, and cover their living costs before they turn 70:"

- Own a 5-bedroom home with a clearly separate living space for my parents (Metric)
- Support them financially with an extra \$2,000 per month for living expenses (Metric)
- Take them on quarterly trips to see their friends and relatives (Activity)
- Feel they are secure and supported. (Feeling)

4. Original Goal: "I want to be strong in my faith."

Specific Goal: "I want to be committed to my faith daily and take on a leadership role within my church by next September"

- Attend church weekly (Activity)
- Hold a leadership position in my church by 30 (Metric)
- Lead a monthly bible study (Activity)
- Read two spiritual books per year (Activity)
- Feel strongly connected to God (Feeling)

*If you don't have a spiritual path, we encourage you to invest some time into exploring one. You can explore in any way you choose, although finding fellowship within a group or practice has helped us tremendously (See Chapter 3).

Likely there will be one or two of these categories you will be less energized to work on. Keep in mind, you don't have to set a vision to a be superhero in each category, but you should have some type of standard for yourself. Focus on having integrity about what type of life you want to build. Ask Yourself: What is most important to you?

For example, we have never felt the need to be Ironman champions or even run a half marathon. These are great goals, but they won't be in our future visions because we would rather have more moderate exercise goals and instead focus on other areas of our life.

Oftentimes putting this life vision together can still feel overwhelming. Few people know exactly what they want their life vision to be 10 years from now, let alone 30. What helped us in putting a framework together is to ask in another way, what are some things you *don't want* 10 years from now? **Putting a list together of what we *don't want* can be easier and help us define what we do! This has been particularly invaluable for us as we work on extending our vision 2 or 3 phases in the future.**

[Craig here, I knew in my soul I didn't want to have to work for someone else forever. I didn't care as much how, or what that looked like, but it is this burning desire that drove me to begin visualizing how I wanted to live at 35 when I was 25. Because this was a dominant thought process, I could also start to project certain things I wanted to create at 45. Now I'm not 45 yet but it is remarkable how many of the things I did visualize have come true.]

Why Focus On A 10 Year Life Vision?

Although human beings can make a lot of changes in a year, it is difficult to make a *radical shift* in your financial lifestyle, personality, confidence, deeper systemic belief systems or to build a business to a level of financial independence. 5 or 10 years are often close enough you can visualize, but far enough you can still make substantial progress. Many people are too naive on how little impact you can have in a year but how much *exponential impact* you can have in ten years.

In terms of finances, another reason we choose to focus on 5 and 10 years is because of common business timelines we have observed. Below is a *particularly generic* timeline we have seen in our own businesses and *HUNDREDS* more with Craig's background as a business and commercial banker. Keep in mind, by side hustling (and embracing the security of job) you are likely investing less time than someone who has started a business for their full-time career.

Completing Your Life Vision Worksheet

Figure 2.1 (above) includes a Life Vision worksheet for you to complete. We have also provided an example In addition, you can find a downloadable PDF or spreadsheet on our website: www.tandemconsulting.co.

We encourage you to begin filling out this document after completing this chapter! As you continue to progress through the book there will be some additional items to add, which will also challenge you to revisit this document.

By the time you finish reading this book we want you to have your vision sheet *fully completed* and have the clarity we have been discussing. We also advise over time you to personalize this document and evolve or make custom adjustments for your own goals, lifestyle, etc.

We are confident just by doing this activity the quality of your life will improve. You will have a clear understanding of WHY you are moving forward with a side hustle and your real time, monetary and energy investments.

Additional Tips:

1. For those that have a significant other, work to put your ten-year vision together, *together*. Please do not put your goal of world domination in full motion and forget to include the Queen. Or the King. *Not* cool. When age appropriate, engage your children. They will absolutely add to the jollification and creativity, and by helping them understand some of the families' long-term goals or missions they will begin to appreciate and maybe even understand why you are working or why you can't play "Guess Who" with them *every* hour of the day. Putting together your Life Vision with your team, partners or life-mate should be enjoyable. It should bring you closer together and be exciting. Make an annual date night out of it! Keep in mind, you likely will not agree on everything.
2. Your Vision is a *living, breathing* document. Return to it quarterly or monthly and revisit, refine, and add as necessary! Have fun with the process and reference it frequently when discussing future dreams or goals.
3. Make the vision *visible*. Post it or elements of it in a place that all vested parties can see. Sign an agreement, create a mantra, or go straight up dork patrol and make family hats (no visors please) or t-shirts.
4. Don't create a Life Vision based on what other people or society thinks it should be. Shredding other's or societal expectations of what a meaningful life should be is critical in creating a fulfilling and happy life. Oftentimes our parent's expectations of us are particularly influential in shaping our future. Investing time meditating on what we truly value and what is important is necessary is some of the most important work we can do.