

Life Plan Worksheet

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Successful companies have a business plan.
Is your life successful...truly?

I. QUALITY-OF-LIFE ASSESSMENT

This will assist you in increasing awareness about your quality-of-life satisfaction. Use your first gut response, while remaining aware of over-thinking or rationalizing. Edit categories to meet your own needs. Rate your **current level of satisfaction** from 1 to 10 in each area: 10 represents 100% satisfaction. 1 represents no satisfaction.

Quality-of-Being

Physical

- _____ Vitality / energy
- _____ Health
- _____ Sleep
- _____ Relaxation / breaks
- _____ Exercise
- _____ Nutrition
- _____ Weight / BMI (Body Mass Index)
- _____ Blood pressure level
- _____ Cholesterol level

Emotional

- _____ Stress level
- _____ Angry, anxious, apathetic
- _____ Attitude / mood
- _____ Passion / excitement
- _____ Contentment / peace of mind
- _____ Grounded / centered

Mental

- _____ Stimulated / challenged
- _____ Focus / concentration
- _____ Thoughts of anger, anxiety, avoidance
- _____ Limiting thoughts of self
(i.e., I should be better at...)
- _____ Limiting thoughts of others
(i.e., S/he is wrong.)
- _____ Limiting thoughts of situations
(i.e., Things should be different.)

Overall Quality-of-Being

- _____ Work-life balance
- _____ Daily enjoyment

Life Purpose

- _____ Career engages strengths and interests
- _____ Provide meaningful, rewarding service
- _____ Professional development
- _____ Personal / spiritual development
- _____ Giving back

Relationships

- _____ Romantic partner
- _____ Family
- _____ Friends / community
- _____ Coworkers / associates

Prosperity

- _____ Living within your means
- _____ Good debt to income ratio
- _____ Retirement / investments
- _____ Funds for leisure / philanthropy

Physical Environment

- _____ Home
- _____ Work
- _____ Car

Leisure

- _____ Self-care
- _____ Hobbies / sports
- _____ Entertainment / fun
- _____ Vacations

_____ Overall Quality of Life

List below what you see as your strengths and areas for growth from your answers above.

STRENGTHS

- 1.
- 2.
- 3.
- 4.
- 5.

AREAS FOR GROWTH

- 1.
- 2.
- 3.
- 4.
- 5.

II. KEY VALUES

On scrap paper, fill a page of all your values. Choose your top 5 values. Take time to carefully prioritize them to be sure the most important value in your life is listed first and so on. After each of your top 5 values you list below, write associated words or phrases to clarify what the value means to you. Note: to get to the root value, keep asking, “What will that give me?”

Examples:

Values: family, relationship, career, life purpose, personal development, consciousness, creativity, freedom, independence, service, religion/spirituality, self-expression, health, peace, wisdom, love.

Value ~ Associated words or phrases:

LOVE ~ practicing unconditional love with family, friends and co-workers

WISDOM ~ compassionate intelligence that guides every area of my life

Key Values

Associated Words or Phrases

- 1.
- 2.
- 3.
- 4.
- 5.

III. LIFE PURPOSE

Set aside some time to be quiet. Have a pen or pencil and plenty of writing paper on hand. Still your mind and call upon your wisdom to guide you to the highest thought about your life and purpose. Contemplate the following questions and write out your answers. The purpose is to at least start this process. It can evolve.

What are you passionate about?

Hint: What do you care deeply about? How can you serve humanity? What really lights you up?

What are your gifts and talents?

Hint: What do other people say you are good at?

What do you want to create?

Hint: Answer this as though you already had \$100 million annual income.

What do you want to learn in order to have more love and joy in your life?

Hint: This may include skills, attributes, attitudes, disciplines, philosophy and/or knowledge.

What nurtures me?

Option: Quickly go through picture magazines and notice what depicts “what nurtures me.”

Using the information gathered, complete the following statement or create your own from scratch.

MY PURPOSE

I, (name) am here to serve (with respect to your passions)

by applying my gifts of (talents)

,and (more talents).

in order to create....

I fulfill my purpose as I learn to ...

I am nurtured in the following ways:

IV. INTENTIONS

A statement of intention is ongoing. Intentions direct our actions and inspire our goals and actions. Intentions, unlike goals, are not measurable.

Examples: “I intend to have a partner who adds love and joy to my life.”
“I intend to have vibrant health and well-being.”

Using your **Life Inventory, Values, and Life Purpose** as your guide, write what your intentions are in the major areas of your life. Remember, the core of who you are is body, mind and spirit. What springs forth in your life comes from your core. (Edit categories as you wish.)

Quality-of-Being

Physical

Mental

Emotional

Life Purpose

Relationships

Prosperity

Physical Environment

Leisure

OVERALL

V. GOALS & ACTION STEPS

Reviewing your **Life Inventory, Life Purpose, Values, and Intentions**, what 3 goals and corresponding action steps would you like to start with?

GOAL #1

Action steps

GOAL #2

Action steps

GOAL #3

Action steps