

TRUE WEALTH LIFE PLAN™



True Wealth... life filled with love, quality relationships, purpose, health and prosperity!

*Values
Passion
Purpose
Spirituality
Dreams
Health
Success*

Steps to Developing Your True Wealth Life Plan™

A generic Life Plan is basically just that – a Plan for what you would like to do with your life. It helps you look at areas where you want to set new goals or make some changes. Some of these areas are:

- where you live
- who you spend time with
- what you do with your time
- where you work , go to school, and/or volunteer

A True Wealth Life Plan™ encourages you to do the above while taking into account your *values and passions*. Life is a journey and the path we take either leaves us feeling fulfilled or empty. So let's get started.

1. First step is to identify what is most important to you. What do you value most in life? This step is very important because it is the foundation of everything that follows. Please take your time and really give it a lot of thought.
2. Next are a series of questions to help you explore and possibly discover what your meaningful purpose is in life. You may want to warm up for this section by taking a personality test. You can take one at www.humanmetrics.com. There are others on the internet or you may want to visit a life coach and take a Myers-Briggs personality test. Having a grasp on your personality and what your gifts are will help you discover your purpose which fuels your passion and commitment and gives more meaning to your life.
3. Now it gets exciting. You will vividly describe the vision you have for your future. This represents your ideal life that results from being true to your meaningful purpose. It envisions everything such as: your living and working environment, with whom you want to surround yourself, how you want to spend your time, and what you want to accomplish in your personal and professional life. The key to your compelling vision is to create one that motivates you to take action and keeps you focused even in times of trouble.
4. You'll create a personal mission statement and a professional mission statement. These statements become your roadmap for moving toward your vision and they help guide you in daily living.
5. You'll set goals and create an action plan that will help you implement your mission, live your values, and move toward achieving your vision. Everyone reading this has the ability to experience meaning and fulfillment in their life. One of the keys to making this happen is having a clear picture which ignites passion for what you want to do. After you complete the True Wealth Life Plan™, you will be able to really see where you want to go and by truly focusing your energy on that which is important you will be energized and start to make your vision a reality.

What do you value most?

In this exercise, you'll identify what you value most in life and then rank them from most important to least important.

Directions: Rank in order of importance, six areas that you value most in your life.

Areas I value most in my life are:

- | | |
|--|---|
| <input type="checkbox"/> Family | <input type="checkbox"/> Helping Others |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Simplicity |
| <input type="checkbox"/> Fun/Happiness | <input type="checkbox"/> Peace of Mind |
| <input type="checkbox"/> Financial Security | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Gratitude |
| <input type="checkbox"/> Significance | <input type="checkbox"/> Abundance |
| <input type="checkbox"/> Health | <input type="checkbox"/> Faith |
| <input type="checkbox"/> Spiritual Fulfillment | <input type="checkbox"/> Growth |
| <input type="checkbox"/> Love | <input type="checkbox"/> Honesty |
| <input type="checkbox"/> Relationships | <input type="checkbox"/> Integrity |
| <input type="checkbox"/> Generosity | <input type="checkbox"/> Kindness |
| <input type="checkbox"/> Achievement | <input type="checkbox"/> Selflessness |
| <input type="checkbox"/> Passion | <input type="checkbox"/> Security |
| <input type="checkbox"/> Creativity | _____ |
| <input type="checkbox"/> Leaving a Legacy | _____ |
| <input type="checkbox"/> Positive Attitude | _____ |
| <input type="checkbox"/> Vitality | _____ |
| <input type="checkbox"/> Wisdom | _____ |
| <input type="checkbox"/> Intimacy | _____ |

Now, go back and indicate the actual percentage of your time you spend living and supporting those values.

What do you value most?

Look at your list. Are you spending your time in alignment with your values?

Knowing your values and spending your time in alignment with your values allows you to make the right decisions for you. You'll be happier with less internal conflict. Having true conviction to live by your values, will ignite passion in your life, giving a sense of achievement with each of your accomplishments.

You may find that over time due to changing circumstances in your life that your values change. What's important to you today may not be as important to you five years from now. It's important to review your values on a regular basis to make sure they are still important to you.

Focus on your values by listing them below and assign a key action to help you fully integrate your values into your life.

Example

	Value	Action to integrate it more fully into my life
1	Health	Exercise at least 30 minutes a day 5 days a week

	Value	Action to integrate it more fully into my life
1		
2		
3		
4		
5		
6		

You'll use this chart later when you write your goals.

What inspires you?

10. 5 years from now looking back, what must have happened in your life for you to have accomplished what you want with your life?

10 years

20 years

Vision

You can't drive to any destination without knowing where you are going. This applies to your life also. People who achieve great things in their lives know exactly where they are going. Having this vision of where they are going is a very powerful tool once they apply the necessary steps to get *there*.

"There" is your ideal future scenario, that you would create if you had absolutely no constraints and could simply make it happen. It's your vision for your environmental surroundings, the people you associate with, what you spend your time doing, and what you want to accomplish. It's different for everybody. For example, perhaps you want to be successfully self-employed, working from home, and living in the mountains. Or perhaps you want to work for a non-profit organization that speaks to your heart and live near your children and grandchildren. It can be anything, but it must be something and it must be clearly defined. It must include tangibles so you can see it, feel it, touch it, smell it, and hear it so you can get all your senses involved in helping you drive toward it.

Directions: Disengage from the present and position yourself in a future with unlimited possibilities. Eliminate your limiting beliefs and think big. With this frame of mind, you can develop a vision that propels you to success, contribution, and happiness far beyond what you've ever imagined.

"I am excited when I wake up full of love for God, family, friends and life. I am a husband my wife is proud of a father my children look up to, and a friend people count on. My family is financially secure, physically fit, and emotionally close. We live in a comfortable home on one acre on a lake in the woods in Northern Michigan. Our home is full of light. It is surrounded by a big porch and setup so that we can run a bed and breakfast. There is a fire pit down by the water for building relationships around a camp fire. We offer free stays for missionaries, under privileged families and other charity groups. We have all the amenities to be a sport retreat for people. Pictures of my family and special moments in our life line the walls. As I look out the window, I see beautiful pine forest and a West view of the lake to admire God's sunsets. My days are spent helping the people around me recharge and enrich their lives. I do this by meeting with my top clients, guiding them in reaching their dreams and aspirations. My financial success enables me to give generously, so I give away 50% of my income and live on 50%. My schedule is flexible. I spend several hours a week on community service projects. My wife and I travel the world, go on mission trips, visit our kids and grandkids, read, and take time to enjoy the beauty of the great outdoors. When I go to bed at night, I sleep soundly knowing that I helped make the world a little better than it was when I woke up."

Vision

Location, surroundings, sounds, smells, relationships...

How do you spend your time?

If I looked back at the end of my life, what must I have accomplished to be satisfied?

Mission

A personal mission statement is a bold statement about the kind of life you want to lead, who you want to be, and how you want to conduct yourself. It will serve as your lighthouse during difficult times and keep you motivated, focused, and true during your life.

Directions: Create your mission statement. It will be one of the most important things you do in your life. Set aside some time for reflection and to complete it. It will evolve over time, but it is important to get a draft on paper so you can continue to shape it.

I live life to the fullest always being present in the moment. I give my life to others in love, time, patience, and support of them. I focus on relationships and above all is my relationship with God, my wife, children, family, and friends.

Goals and Action Plan

The goal-setting process is critical to making all this happen. As we set goals, make sure they are SMAV goals -- Specific, Measurable, Achievable, and Value and Vision driven. One of the keys to goal-setting is to tie them into your compelling vision.

Directions: To achieve your vision make it manageable by breaking it down into pieces. You will set goals first by reviewing your vision and determining what has to happen in 1 year, 3 years, 5 years, 10 years ... Each goal will have three parts. First the actual goal then what action you can take to accomplish the goal and last what the reward from accomplishing the goal will be.

Year 1 Goals

My Age _____ Spouse's Age _____ Kid(s) Age(s) _____

Goal	Action	Reward

Year 3 Goals

My Age _____ Spouse's Age _____ Kid(s) Age(s) _____

Goal	Action	Reward

Year 5 Goals

My Age _____ Spouse's Age _____ Kid(s) Age(s) _____

Goal	Action	Reward

Aligning Your True Wealth Life Plan™
with Your Financial Plan



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clients because of our professional knowledge
experience, integrity, and personalized service.**

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Accounts are carried by National Financial Services, LLC, Member NYSE/SIPC, a Fidelity Investments® company.