



Meaningful Prosperity: Discovery

1. In One Word

It's time for a little free association. With one word and no judgment, describe the current state of your life in these areas.

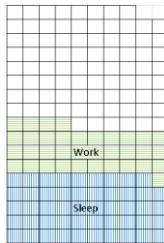
Yes - numbers, emotions, and sentences are all good answers, too!

- The clarity of my financial picture today _____
- My vision of what I want for the future _____
- The insurance that covers my loved ones (life insurance, etc.) _____
- My earning capacity _____
- Paperwork at home _____
- The path I'm on today _____
- My debt _____
- The insurance that covers my self (health, disability, etc.) _____
- My nest egg _____
- Being who I want to be _____
- My family and money _____
- Reflecting my values in my finances _____
- My contribution to the greater world _____
- Money and gut feelings _____
- My understanding of investing _____
- Taxes _____
- My balance of enjoying today and preparing for tomorrow _____
- The paperwork in place in case I die unexpectedly (wills, etc.) _____
- Financial planning _____
- The insurance that covers my things (property, car, etc.) _____
- What does this exercise bring to mind? _____



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2. 168 Hours



Our use of time and money are interconnected. Sometimes we apply both to something important, and sometimes we apply one to free another.

Looking back at spending our time can be easier than looking back at spending our money. Everyone gets 168 hours each week, with no borrowing and no rollover minutes. Fill in how you spend your 168 hours in a typical week.

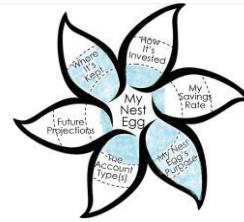
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How does this reflect what is important to you? _____

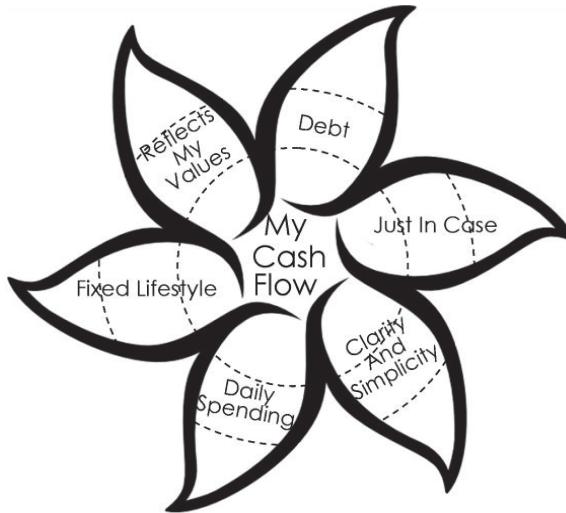
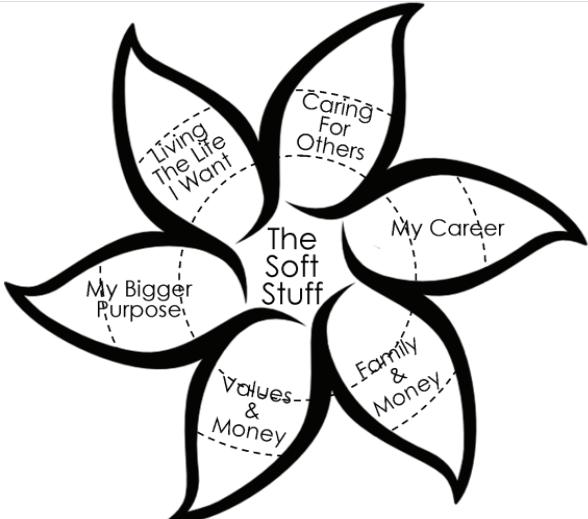


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3. Satisfaction Mandala



Use these four 'flowers' to show your current satisfaction or understanding with four areas of your financial life. Shade each petal in as it feels right to you, with more shading in the areas where you're more comfortable.



I'm also satisfied with

- * _____
- * _____
- * _____

I'm also dissatisfied with

- * _____
- * _____
- * _____



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4. Thank-You Letter From Your Future Self

Picture your future self, any number of years from now. Write yourself a thank-you letter from them. Describe what you think they'll be grateful you are doing now and will do in upcoming years.



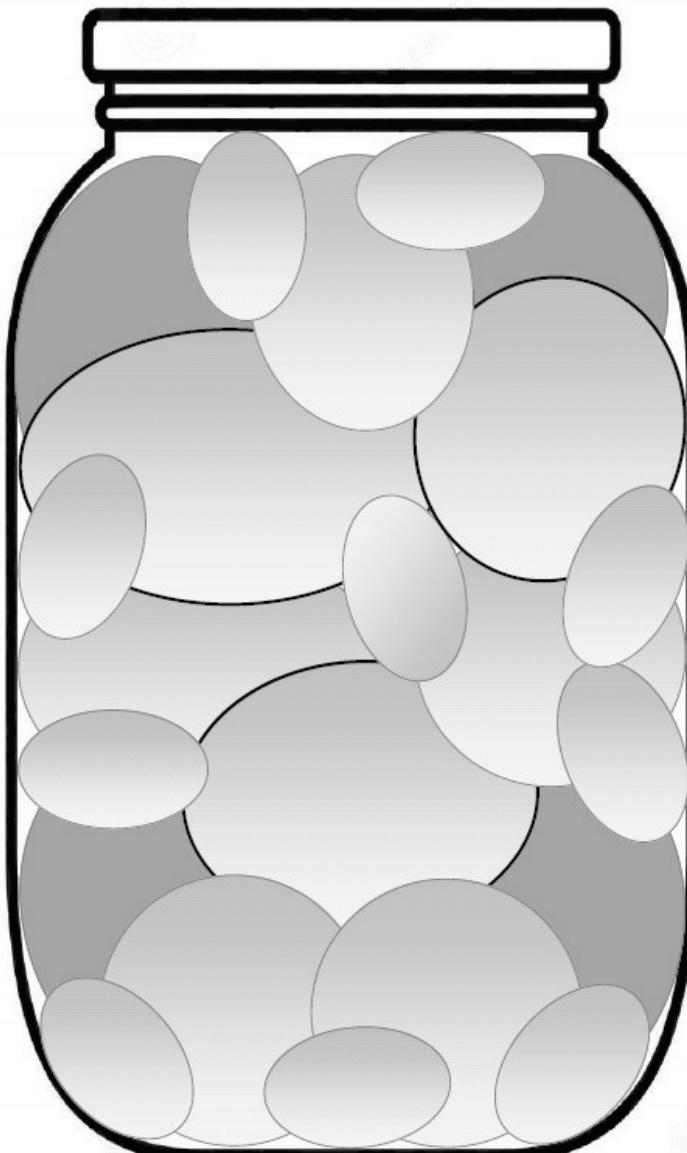
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5. Rocks and Sand

We've all heard the parable about putting rocks in our jar before the sand, fitting the small stuff in around what is most important.

The jar below represents your life's elements, prioritized at your ideal. What are your rocks – the three most important elements that deserve your time, energy, and money? Your smaller stones? Your pebbles?

Label them below.





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6. A Role Model

Think of someone you admire. Anyone. They don't have to be perfect, just someone who inspires something in you.

1. Write their name or add their picture above the line.
2. In the left column, describe their traits that you are living today.
3. In the right column, describe their traits that you aspire toward.

Role Model

As I Live Today	As I Aspire Toward