



## 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.

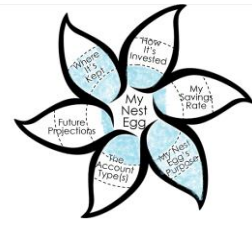
Yes - numbers, emotions, and sentences are all good answers, too!

- 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? \_\_\_\_\_

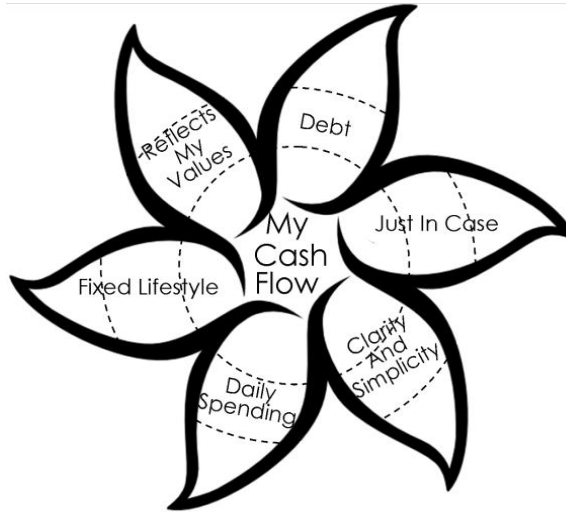
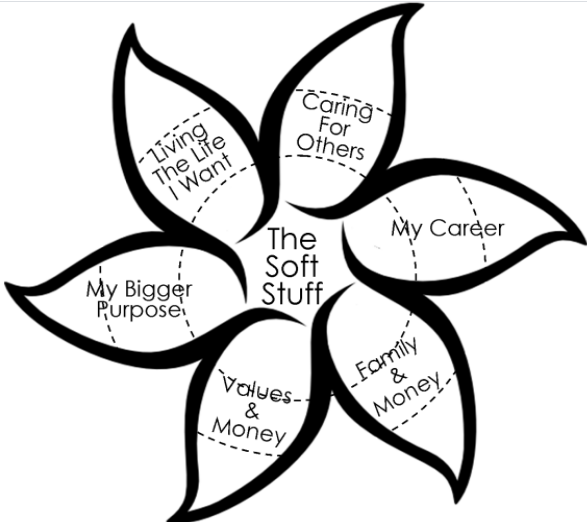
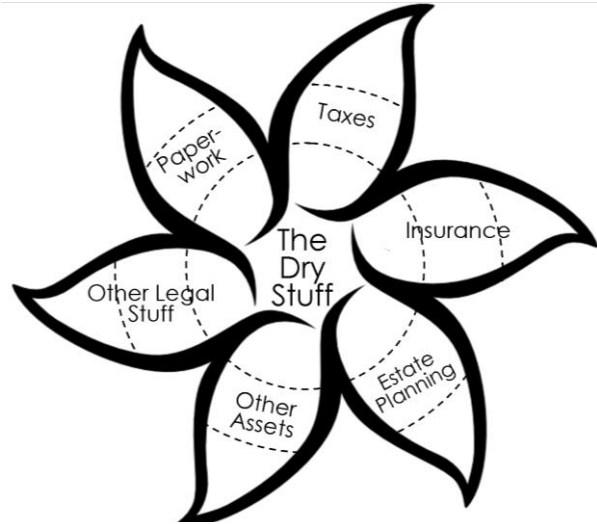
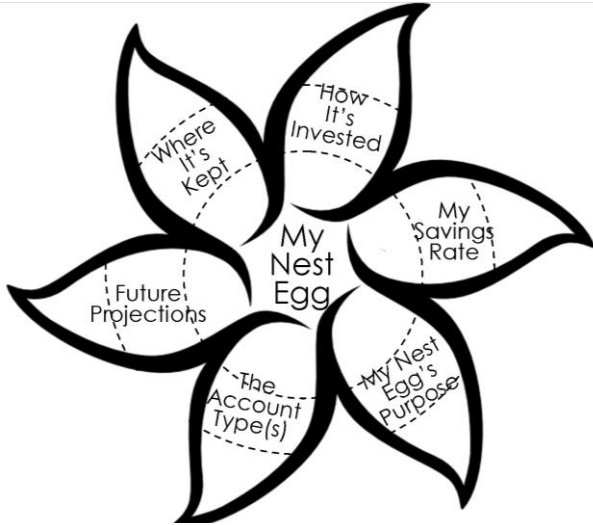




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**3. Satisfaction Mandala**



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

- \* \_\_\_\_\_
- \* \_\_\_\_\_
- \* \_\_\_\_\_