



Your Life Plan

Your Name: _____ Profession: _____

Date: _____ Industry: _____

Bank Account Balance(s): _____ as of ____ / ____

(We understand the confidentiality of this information, yet this is how we will establish a baseline to help you measure progress. No account numbers...balances of Checking, Savings, Money Market. please)

1. Where would you like to be 1 year from today? (Do not hold back)

2. Why am I not already there?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

3. If my best friend asked my advice on this exact same situation, what would I tell them?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

4. What is your vital financial goal you will achieve by _____, 20_____

4.1. Goal Statement: I will achieve _____ by _____, 20_____

4.2. What action must you take to achieve this goal? (Start Date: ___ End Date: ___ for each action)

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

4.3. What are the major constraints preventing me from achieving this goal?

- a. _____
- b. _____

- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

5. What is your vital mental health goal? (YOU)

5.1. Goal Statement: I will _____ by _____, 20____

5.2. What action must you take to achieve this goal? (Start Date:____ End Date:____
for each action)

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

5.3. What are the major constraints preventing me from achieving this goal?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____

g. _____

6. What is your vital physical health goal? (YOU)

6.1. Goal Statement: I will _____ by _____, 20____

6.2. What action must you take to achieve this goal? ? (Start Date:___ End Date:___ for each action)

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

6.3. What are the major constraints preventing me from achieving this goal?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

7. What is your vital relationship goal? (Family, Co-workers), Clients so on..)

7.1. Goal Statement: I will _____ by _____, 20____

7.2. What action must I take to achieve this goal? ? (Start Date: ___ End Date: ___
for each action)

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

7.3. What are the major constraints preventing me from achieving this goal?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

8. What is your vital spiritual goal? (I am not talking about organized religion)

8.1. Goal Statement: I will _____ by _____, 20___

8.2. What action must I take to achieve this goal? ? (Start Date: ___ End Date: ___
for each action)

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

8.3. What are the major constraints preventing me from achieving this goal?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

9. What are you assuming to be true, but if it weren't true would change your thinking? (About any goal or your current thinking about any thing in regards to this plan)

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

10. What trade-offs and sacrifices are required to achieve this plan?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

11. What are the possible solutions to this problem?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____

12. What could I do to improve my situation?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

f. _____

g. _____

13. What are my vital success factors? (This is your critical thinking area)

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

14. What activities and skills must I excel at to achieve my goals? If I could _____ really, really, really well, I could achieve this plan and all my goals within this plan.

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

15. How will I make certain I excel at these activities? Who will I use as an accountability partner?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

16. What programs have you already gone through, and your results:

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

Your Success Coach



Jim White, Ph.D.