



# LIFE ASSESSMENT

Rate the following on a scale of 1 to 5, 1 being Least True and 5 being Most True:

## Relationships & Family

- I spend quality time with my family each week.
- I get together with friends at least once a month.
- There is no one in my life who I have ongoing resentment for.
- I put conscious effort into enriching my relationships with family and friends.
- I check in with family and friends often to see if I can support them.
- I take complete responsibility for all relationship conflicts when they arise.
- I easily trust those I live and work with.
- I am 100 percent honest and open with those I care about.
- I commit to others in balance with my own needs and honor my commitments.
- I ask for help when I need it.

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Total Score:

## Physical

- I move my body at least 3x a week for 30 minutes.
- I do cardiovascular exercise at least 1x a week.
- I do stretching and/or yoga type exercise at least 1x a week.
- During a typical day, I watch no more than 2 hours of TV.
- I eat breakfast (more than just coffee) every day.
- I don't eat fast food, ever.
- I spend time outside for at least 30 minutes a day, every day.
- I have undisturbed sleep for at least 8 hours each night.
- I don't drink soda.
- I drink at least 8 glasses of water per day.

ANSWER

Total Score:

## Business

I plan my day out the day before.


My goals are written, prominently displayed and regularly reviewed.

I love what I do and enjoy getting up everyday to do my job.

I am continually filled with feelings of accomplishment and satisfaction from my work.

I am constantly improving my professional strengths and weaknesses.

If I could, I would still do my job without pay.

I am home with my family on time every day.

My current business/job has the realistic potential of accomplishing all my financial goals for the next year.


My current business/job has the realistic potential of accomplishing all my financial goals for the next 10 years.


My current business/job gives me a feeling of significance as it makes a positive difference in the lives of others.


Total Score: \_\_\_\_\_

## Financial

I have a completely detailed budget and unfailingly stick to it.


I have a diversified financial portfolio.

I save at least 10 percent of my income every month.

I am credit card debt-free.

I have a dedicated six-month reserve account completely funded and set aside.

I feel that I am compensated completely according to my worth.

I have an updated and complete estate plan.

I have the needed insurance for my family should something happen to me


I have a detailed retirement plan that will accommodate exactly what I need to live as I desire after retirement and for the rest of my life.


I live well below my means and never spend money foolishly.

Total Score: \_\_\_\_\_

## Spiritual

I consider myself a spiritual person.


I take at least 20 minutes each day to meditate or pray.

Others who know me would consider me a spiritual person.

I have a personal relationship with my spiritual source.

I study my spiritual beliefs daily.

I practice my spiritual beliefs daily.

I live my life authentically in alignment with my beliefs.

I have relationships that nurture my spirit and that of others.

I consistently use my spirituality to help resolve my problems.

I consistently use my spirituality to help others.


Total Score: \_\_\_\_\_

## Mental

I read or listen to something instructional at least 30 minutes each day.  
I read or listen to something inspirational for at least 30 minutes each week.  
I stay current with my industry news.  
I seek instructional information in my field every day.  
I have a mentor whom I trust.  
All my friends are a positive influence in my life.  
I never engage in gossip.  
I review my major goals every week.  
I have a daily gratitude practice.  
I always say no to requests or obligations that don't fit my core values or objectives.


Total Score: \_\_\_\_\_

## Lifestyle

I have hobbies outside of work that I enjoy and take part in at least once a week.  
I attend cultural events (e.g., opera, museums, theatre) at least once a month.  
I vacation at least once a year with no work communications.  
I spend as much time as I want with my family.  
I spend as much time as I want with my friends.  
I am constantly seeking adventure, trying something new and creating diverse experiences.  
I feel like there is enough time in the day to do what I both need and want to do.  
I live life to the fullest every day.  
I take time out to daydream every day.  
I am completely present in every moment of every day.


Total Score: \_\_\_\_\_

## The Wheel of Life

To determine the balance sheet of your life, take your scores from the previous pages and plot them on the wheel. Start from the center and use the key to mark your current status. Then connect all the dots and you will see how balanced your wheel is or isn't. If it has serious deviations or flat spots you now know why your life doesn't "roll" along as smoothly as you would wish.

KEY: Score of 5 = 1 notch. Score of 6-10 = 2 notches. Score of 11-15 = 3 notches. Score of 16-20 = 4 notches. Score of 21-25 = 5 notches. Score of 26-30 = 6 notches. Score of 31-35 = 7 notches. Score of 36-40 = 8 notches. Score of 41-45 = 9 notches. Score of 46-50 = 10 notches. Use the same score for both Relationships & Family line.

