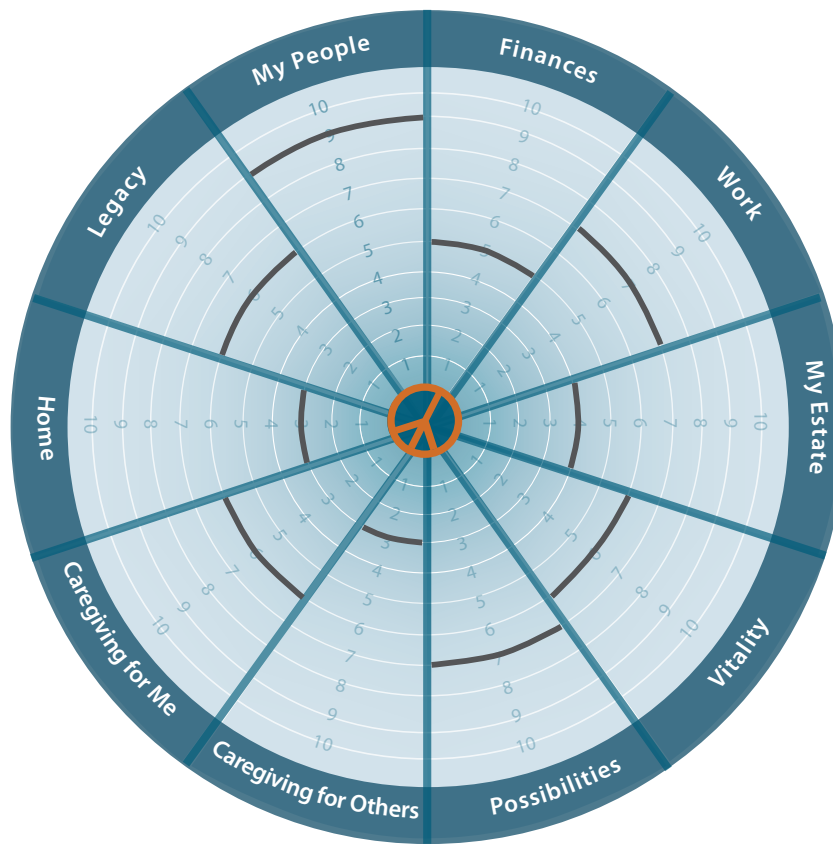


Your Life Planning Wheel

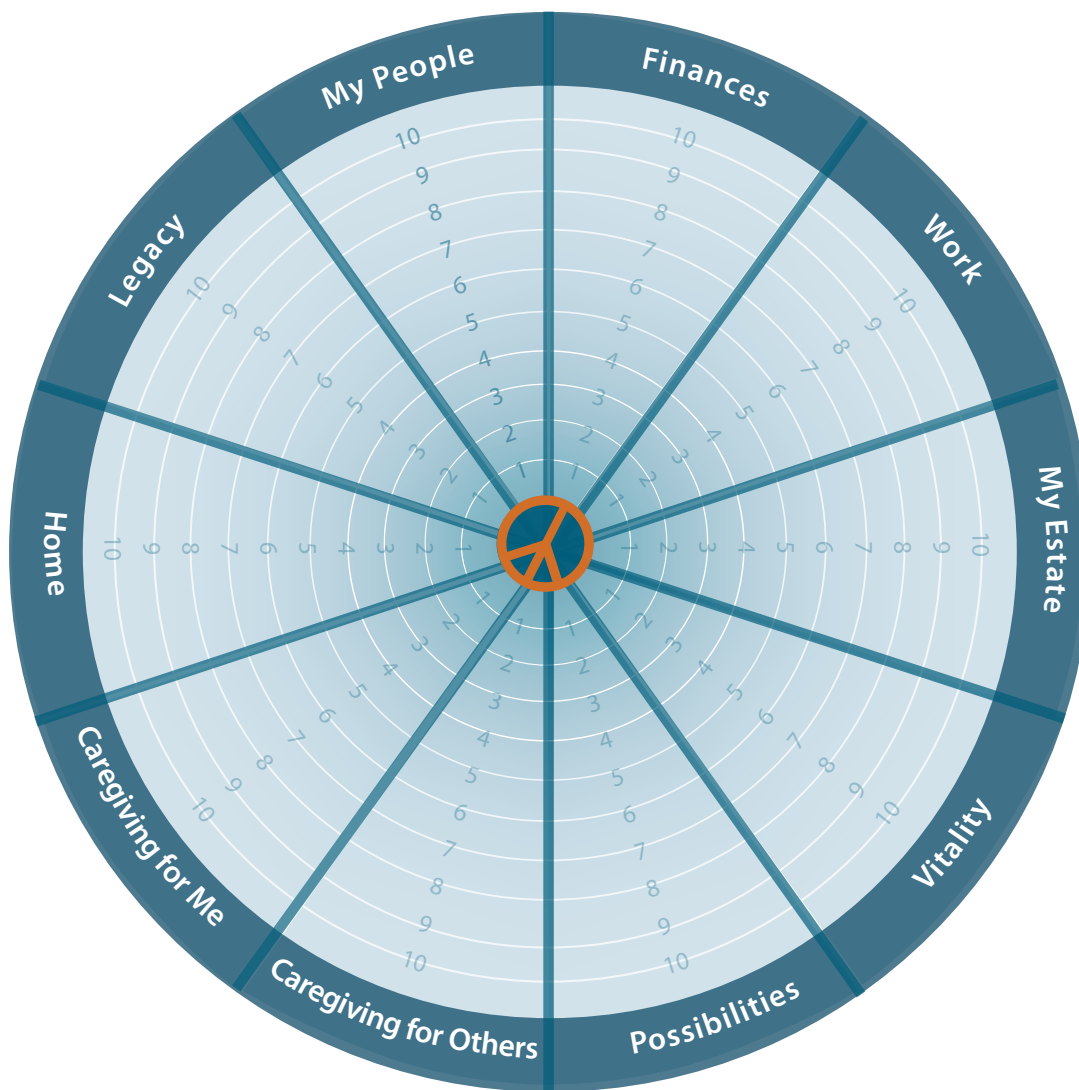
On the following page is your Life Planning Wheel, labeled with words that represent important parts of your life going forward. Read the description for each part and decide how true it is for you. If it is not true for you at all you'll want to give it a score of 1. If it's very true, you'll give it a score of 10. And if it's somewhere in between, you can give it an appropriate score. Then, draw an arc inside each slice that corresponds with the score you gave. When you're done, your chart will look something like the one below except the scores will be yours.



When you finish, take it all in. Where are you in your life today? What do you want to change for the future? Think about those things and then get in touch so we can discuss how we can work together to get you where you want to be.



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My Life Planning Wheel

My People: I have a supportive network of family and/or friends who will be there for me —and me for them—as we age.

Finances: I have a plan in place for my future financial and insurance needs.

Work: If I plan to work in the years ahead, I know what the work will be.

My Estate: I know what is involved in estate and end of life planning and have my plans in place.

Vitality: I know what I need to do to remain healthy in my body, mind, and spirit.

Possibilities: A cool hobby, volunteering, special projects, adventures, courses, travel. I know I'll leverage my free time well in the years ahead in ways that really matter to me.

Caregiving for Others: I am prepared to be a caregiver for someone dear to me.

Caregiving for Me: If I become disabled when I am older, I know what my living options will be including who will take care of me, where I'll live and how I will pay for it all.

Home: I have a good idea about where I will be living in my later years.

Legacy: I know what tangible and intangible things I will gift, bequeath or leave behind for others.

NAME _____

DATE _____