



SELF-ASSESSMENT FOR INTENTIONAL GOAL PLANNING

General-

- How many minutes or hours do you have each evening, day, week, month that are unscheduled?
 - How many hours of sleep do you get each night on average?
 - Do you exercise regularly?
 - How often do you cook dinner? How often do you eat dinner at a restaurant or order out?
 - How many hours do you spend at work, both in the office and working at home?
 - How often do you have 'family time' and/or meaningful conversations with your loved ones?
 - How would you rate your overall happiness and quality of life on a scale of 1-10?
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Relationships-

- Do you feel like you are spending enough of your free time cultivating important relationships with your family and friends? If not, why? If yes, why?
- Which relationship feels like it needs the *most* time and attention right now in your life?
- Is there a relationship in your life that you feel is toxic to your mental, emotional or physical health and wellbeing? If so, what **are** you receiving from this relationship that is keeping you invested in it?
- Do you find yourself tired and stressed in other areas of life; taking away from giving the time and energy you'd like to the people you love?



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Finances-

-When you go to the store, do you shop with a list and stick to it, or do you end up with lots of extra things you weren't planning on purchasing?

-During holidays and celebrations, do you get in debt to make purchases? Are you mindfully and intentionally giving gifts that others will value and cherish, or just to fulfill the cultural and familial gift-giving obligations?

-Are you clear and direct with yourself and what it means to 'need' versus 'want' something?

-In case of unexpected events like your car breaking down, an emergency room visit, a flight that must be taken, do you have an adequate amount of extra money saved?

-How much of your time do you spend thinking about money related matters?

Health-

-Do you wake up in the morning feeling refreshed and ready to begin the day, or sleep deprived and weary? How many hours of sleep are you getting each night?

-Take a minute and jot down what you ate yesterday and if possible the day before. Be sure to include snacking and the drink you had to wind down after work. Is what you are putting into your body healthy and able to give you the proper nutrition and fuel for what you are trying to get out of it?

-Do you exercise your body at least 3 times per week for 30 minutes each time? How often do you walk during the day? Do you find yourself mostly sitting at work and at home, or moving?

-How is your mental health? Do you find yourself feeling happy, neutral, or like things could be better the majority of the time? Do you feel fulfilled as an individual, in the 'role' in your family, as an employee?



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Learning-

-Are you involved in any classes or hobbies that challenge your skills or thinking processes? Would you like to be? Look at what you do naturally in your free time (not electronically related); is there something new you can learn about it?

-What was your favorite subject in school as a kid? In college? Do you still enjoy it?

-Do you like reading? Learning as adults usually involves reading, but even if you don't enjoy it, or don't have the time to sit down with a book, there are plenty of great options like Audible.com, where you can listen to books while you are driving, exercising, cooking, etc.

-Do you value continuing to learn?
