

Life Balance Worksheet

What are the most important areas of your life?

Are they each in 'balance' in relation to the others? Are you investing appropriately in each area, or are there some areas that are being over-invested while others are neglected?

Choose your Top Priority life categories (we can only focus on so many things at one time, and remember you can always develop sub-categories under a given topic).

Personal Relationships:

- Spouse / Partner
- Parent
- Family Member
(*child, sibling, extended family, etc.*)
- Friendships
- Other?

Professional Roles:

- Supervisor / Leader
- Colleague
- Staff / Team member
- Contractor
- Student
- Other?

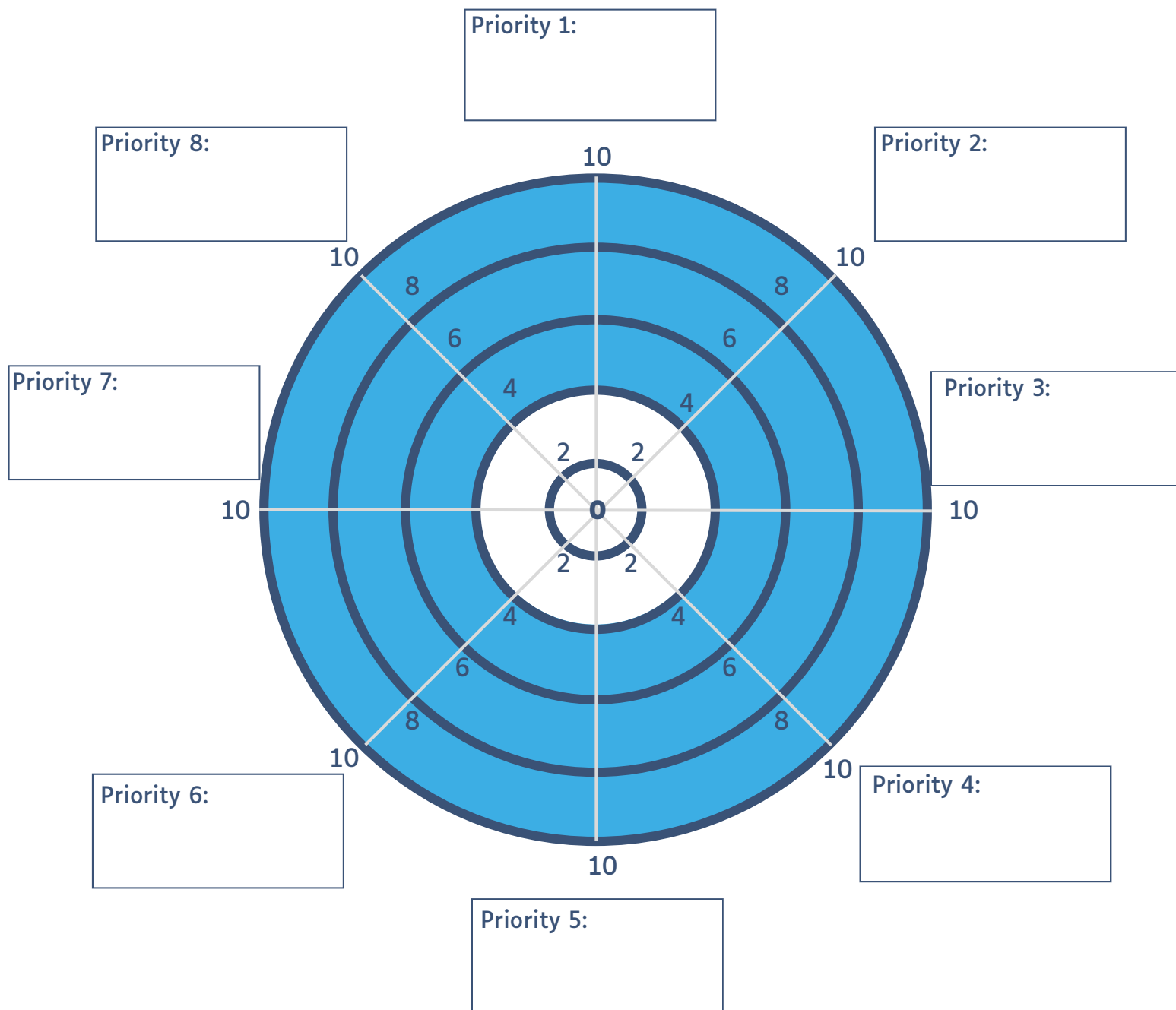
Personal Growth:

- Spiritual Growth
- Health & Wellness
- Financial Management
- Career Growth
- Community Involvement
- Other?

Put your chosen priorities on the Wheel below.

- **Rate your current state:** 0 = Crisis, 5 = Moderate, 10 = Outstanding
 - Remember, it's up to you to define what "Outstanding" looks like for you
 - Get input from a few people who know you well and will give you honest feedback
- **Look at the Whole:** Are there any areas that are "out of balance"?
 - **Sustain:** Where are you doing well and want to maintain?
 - **Invest:** Where do you want to invest, in order to create better balance?
 - **Pull back:** Are there any areas in which you are over-investing? Where you should pull back (especially in order to create space for investing in other areas)?
- **Develop an Action Plan:**
 - What specific steps can you take to invest in a given area?
 - Who can help you or even partner with you along the way?
 - What barriers (mindset, relationships, logistics, etc.) are holding you back and how can you address them?
 - Who can hold you accountable to taking the steps you intend to take?
- **Re-assess Periodically:**
 - More frequently at first to ensure a strong start (weekly or even daily).
 - Regularly over time to ensure sustained momentum (monthly or quarterly).

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Areas of Strength: Where am I doing well? What will I do to maintain or even extend this area?

Areas of over-investment: Are there any areas in which I'm over-investing? What would a 'healthy boundary' look like in this area?

Areas for Investment: Where do I want to invest? What specific steps will I take?

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PRIORITY 1: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 2: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 3: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 4: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

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PRIORITY 5: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 6: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 7: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?

PRIORITY 8: _____

- What are my hopes in this area (broad aspirations)?
- What are my Goals in this area (Specific, Measurable, Aligned, Realistic, Time-bound)?
- What specific steps will I take to move forward in this area?