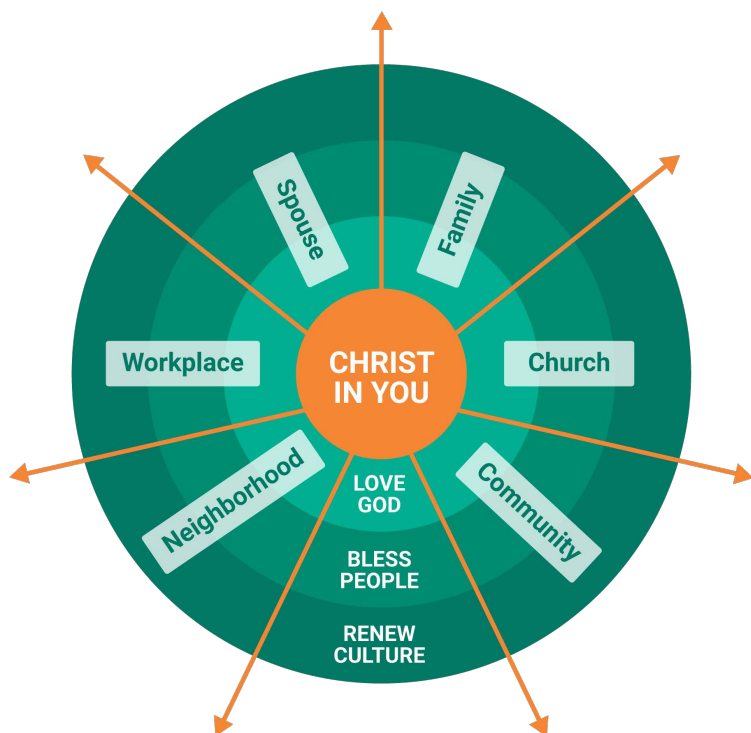


Life Planning



THE CENTER
MEMPHIS

Life Planning Instructions

1. **Areas of Life Worksheet** – The purpose of this sheet is to help clarify what the major areas of your life are.
 - What You Value – In this section, you should freely list what you value. What you value can be people, institutions, environments, activities, objects, or qualities – such as honesty, faith, etc.
 - What You Do – In this section, list various things that you do – such as working, reading, playing with kids, volunteering, etc.
 - Major Areas of Life / Life Accounts – In this section, compare the two lists of what you value and what you do, then reflect upon the themes, and create a shorter list that represents the most important areas of your life. For most people this will be 6-10 major life areas. Rank the major areas of your life by order of importance with 1 being the most important area of your life. There should not be any ties, unless it is a personal relationship with the same exact status – for example children, parents, etc.
2. **Eulogy Prep Sheet** – Consider and list the most important people and communities in your life now or may be in the future. Write their specific names (5-8). It is ok to have some that you do not know yet, for example, a future child, grandchild, colleague, or friend. Then, consider and write down what you want them to remember about you.
3. **Eulogy** – Consider what you want your legacy to be. Consider the impact you will make on the people and communities you are a part of. Even consider the timing, how long you would like to live. Fill out the date, and, in the space below, write the words that you want the most important people in your life to say about you. Do this for the top 5-8 people you believe your life will impact.
4. **Master Account Sheet** – Based upon your major areas of life / life accounts that you ranked on the first sheet, list the major areas of your life in that same prioritized order.
 - Importance Rating – Represents how important this person or area of life is to you, with 1 being most important.
 - Current Rating – Represents how this relationship or area of life is going currently on a scale of 1-10, with 10 being best / no improvement needed.
 - Desired Rating – Represents the improvement you would like to make in this relationship or area of life **in the next 12 months**. For example, an account could currently be a 7, and you would like to move the health of that account to a 9 by the end of 12 months. The importance rating does not impact the current or desired ratings. An account may have an importance rating of a 7, but the current rating could be an 8.
 - Current Hours Per Week – Estimates how many hours you currently spend with this person or area of life.
 - Ideal Hours Per Week – This is your current estimate on the hours you should be spending on this account, weekly to achieve the desired rating. * You will finish this step after completing all Life Planning sheets.
5. **Account Vision Sheet** – Number the sheet in accordance with an account on the master account sheet, and name it the same as the person or area of life. Based on your eulogy, write a purpose statement for this account. Then, write a vision for what that relationship or area of life should look like on a single specified future date (either 5, 10, or 20 years from now).
6. **Yearly Account Planning Sheet** – Restate the specific purpose of this account by considering the end result or ideal future for this relationship or area of life. Name and describe 5-10 disciplines / regular activities it will take to achieve the vision for this account. Use the frequency column for how often that activity should take place. For example, date night with your spouse weekly. Repeat for each person or area of life, and number each account according to the master account sheet.
7. **Calendar** – Move all of these activities, for each account, to the appropriate calendar. Include all activities for the next 12 months.

Areas of Life Worksheet

What You Value

What You Do

--	--

Major Areas of Life / Life Accounts

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Eulogy Prep Sheet

Consider and list the most important people and communities in your life now or may be in the future. Write their specific names (5-8). It is ok to have some that you do not know yet, for example, a future child, grandchild, colleague, or friend. Then, consider and write down what you want them to remember about you.

Who do you want to be remembered by? **What** do you want them to remember about you?

	Who	What
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Eulogy

for

(full name here)

Date of birth: ____ / ____ / ____

Date of death: ____ / ____ / ____

Consider what you want your legacy to be. Consider the impact you will make on the people and communities you are a part of. Even consider the timing, how long you would like to live. Fill out the date, and, in the space below, write the words that you want the most important people in your life to say about you. Do this for the top 5-8 people you believe your life will impact.

Master Account Sheet with Ratings

Based upon your major areas of life / life accounts that you ranked on the first sheet, list the major areas of your life in that same prioritized order.

- **Current Rating** – Represents how this relationship or area of life is going currently on a scale of 1-10, with 10 being best / no improvement needed.
- **Desired Rating** – Represents the improvement you would like to make in this relationship or area of life in the next 12 months. For example, an account could currently be a 7, and you would like to move the health of that account to a 9 by the end of 12 months. The importance rating does not impact the current or desired ratings. An account may have an importance rating of a 7, but the current rating could be an 8.
- **Current Hours Per Week** – Estimates how many hours you currently spend with this person or area of life.
- **Ideal Hours Per Week** – This is your current estimate on the hours you should be spending on this account, weekly to achieve the desired rating. * You will finish this step after completing all Life Planning sheets.

[illegible]

Account Vision Sheet

Account #____:_____

Clarify Your Vision.

Purpose of account:

Number the sheet in accordance with an account on the master account sheet, and name it the same as the person or area of life. Based on your eulogy, write a purpose statement for this account. Then, write a vision for what that relationship or area of life should look like on a single specified future date (either 5, 10, or 20 years from now).

Yearly Account Planning Sheet

Account # ____: _____

Restate the specific purpose of this account by considering the end result or ideal future for this relationship or area of life. Name and describe 5-10 disciplines / regular activities it will take to achieve the vision for this account. Use the frequency column for how often that activity should take place. For example, date night with your spouse weekly. Repeat for each person or area of life, and number each account according to the master account sheet.

Purpose of account:

	Discipline	Description	Frequency
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			