

20/20 MONEY

GAINING CLARITY FOR
YOUR FINANCIAL FUTURE

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THE JOURNAL

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1. What does a Fully Funded Life look like for you?

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2. What does “prospering” look like for you?

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3. Where would you like to travel? When would you like to go there?

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4. What events would you like to attend or participate in?

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5. Where would you like to live? List the place(s).

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6. What type of housing accommodations would you like to live in?

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7. What are some accomplishments you want to achieve?

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8. Do you want to help your children or grandchildren with educational expenses [private school, college, or training]? If you do, provide details on how you would like to specifically help.

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9. Do you want to start or purchase a business? Detail the type of business you would like to have.

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10. Do you want to give money away to help a church, charity, or other worthwhile cause? If so, what specific ones would you like to help?

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11. Do you want to position yourself to leave behind an inheritance?

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12. Would you like to go on missions trips? What specific type of missions would you like to participate in?

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13. Is it your dream to retire? If so, write down your thoughts as to when you would like to retire and what retirement looks like for you in your Fully Funded Life.

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14. Do you desire to have a second home – a beach house, mountain cabin, lake house, or something else? Write your dream down!

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15. Do you have a specific vehicle (or vehicles) you would like to own? Car, truck, boat, side-by-side, snow machine, tractor, etc.

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16. What do you believe you need to live free of financial stress?

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17. What are your relationship goals?

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18. For those with children or planning to have them, what are your dreams? Do you desire to be a stay-at-home parent? List the goals you have for your children or grandchildren.

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19. What are your health goals? Lifestyle, fitness level, nutrition, etc.

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20. What are your spiritual goals?

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21. What are your career goals? Think about position, influence, and impact.

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22. Are there any specific things you absolutely despise dealing with and want to avoid if at all possible?

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[illegible]

Final Question: On a scale of 1 [not even close] to 10 [beyond wildest dreams], where are you now compared to where you dreamed you would be by this age/stage of life?

NOT EVEN CLOSE		RUNNING BEHIND		ON TRACK		AHEAD OF SCHEDULE		BEYOND WILDEST DREAMS	
1	2	3	4	5	6	7	8	9	10

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Final Question: HONESTLY! On a scale of 1 [not even close] to 10 [beyond wildest dreams], where are you now compared to where you dreamed you would be by this age/stage of life?

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