

# LIFE ASSESSMENT

Workbook to assess your life and create goals



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# OVERVIEW

Completing an assessment to review your life is a highly beneficial activity that can bring about positive changes and help you set goals for your future.

Before going through the Life Assessment on page 3, read through the areas it will cover below.

**CAREER** - Career encompasses your current job as well as your future goals. Are you on track to meet your career goals? Do you have the skills you need? Are you thriving in your current job?

**HEALTH** - Health is both physical and mental health. Are you eating well and exercising regularly? Are you feeling good about your current physical health? Are you taking care of your mental health and maintaining your stress levels? Do you take time for yourself?

**FINANCES** - Finances include your budget, how you are saving, and what your debt level is. Are your finances in a stable spot? Do you have a budget? Are you saving? Are you paying off your debt?

**PHYSICAL ENVIRONMENT** - Physical environment encompasses organization and if the things around you are bringing you life. Is your living space organized to your liking? Do the organization systems you have in place help you throughout the day? Do you think your physical environment could be improved?

**RELATIONSHIPS** - Relationships can include immediate family members, children, romantic relationships, and friendships. Do you have healthy relationships around you? Are there relationships that you would like to work on and make stronger? Are there things you would like to change about the relationships in your life?



# LIFE ASSESSMENT

Take some time to think through each area of your life and the questions on page 2. On a scale of 1 to 10, 1 being the lowest and 10 being the highest, select where you feel you are in each area.

Career

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

Health

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

Finances

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

Physical  
Environment

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

Relationships

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

# ANALYZING YOUR ANSWERS

Answer the below questions to dig deeper into your life assessment answers.

Did any of your answers surprise you?

Which of the 5 topics do you want to make changes in?

What types of changes do you want to make or what type of goals do you want to set?

If you could pick your top three goals, which ones would they be?

# SMART Goals

A SMART Goal is a specific type of written goal that gives you the structure to help you reach it. Goals need timeframes and specifics in order to be a valuable tool in reaching your future vision.

## **SPECIFIC**

Goals need to be specific to what you want to accomplish.



## **MEASURABLE**

Goals have to be measurable in order to know if you have achieved them.



## **ACHIEVABLE**

Goals need to be something that you are willing to work towards.



## **REALISTIC**

Goals have to be realistic and something that you are capable of completing.



## **TIMELY**

Goals need to be based on time and include deadlines.



Example of goal that is not SMART: I want to save \$200 to pay off debt.

Example of goal that is SMART:

I will save \$10 a week in order to save \$200 to pay off debt by December 31st.

# YOUR GOALS

Look back at your answers to the Life Assessment and the three goals you wrote down. Write out the goals and make sure that they meet the SMART requirements. Then write out the next 3 steps you need to take.

## **Goal #1**

**Step 1**

**Step 2**

**Step 3**

## **Goal #2**

**Step 1**

**Step 2**

**Step 3**

## **Goal #3**

**Step 1**

**Step 2**

**Step 3**

# NOTES

