



# CREATING YOUR LIFE PLAN



BUILDING CHAMPIONS™

COACHING BUSINESS AND LIFE | ON PURPOSE





## FIGHTING THE DRIFT

It's easy to get off-course sometimes — and it can happen to any of us. Whether it's in our careers, marriages, finances, health or relationships, we look up one day and find ourselves in a different destination than we had planned or hoped for.

We call this “The Drift,” and all of us can get caught in it during seasons of life. But we've coached thousands of people through a proven process to intentionally design their life rather than just reacting to opportunities and challenges that arise.

By investing the time to complete the process in the following pages, you can create a powerful Life Plan that will help you live in such a way that every day adds up to the life you want now, the legacy you want to leave behind and the impact you can have on others.

When you're creating your Life Plan, the **Living Forward** book is a great resource to keep by your side. It explains every step in detail and provides examples to help you on our way.

[livingforwardbook.com](http://livingforwardbook.com)





## BEGIN WITH THE END

The first step in creating your Life Plan is to begin at the end — your own funeral. While it can be uncomfortable to think about your own mortality, it is a reality we all must face and a challenging exercise that can give us some much needed perspective about our life and what's most important to us. By engaging both your mind and heart, you can create a Life Plan that has the pull power required to change how you think, feel and act.

So to get started, write your own eulogy as if your life ended today. Imagine you are attending your own funeral, and think about what others would say if they were being brutally honest. Don't think about what you would want them to say, but focus on what you think they would actually say about you if they weren't holding back — both the good and the bad.

**Focus on the First Three Rows:** When writing your eulogy, pay special attention to what the people in the first three rows at your funeral would say. These are often the people that will feel the impact of your passing the most, yet too often we focus so much energy on the people sitting in the back rows.



## MY EULOGY

Name: \_\_\_\_\_

Born: \_\_\_\_\_ Died: TODAY (\_\_\_\_\_)



## LEAVING A LEGACY

No matter what you wrote on the previous page, the good news is that you're alive, so there's still time to determine the legacy you will leave behind. Knowing where things stand today, now we turn our attention to how we would want those in our lives to remember us someday in the *future*.

Identify the groups of people in your life that you impact or influence. Examples include:

- Spouse
- Siblings
- Clients and teammates
- Parents
- Children
- Friends

List the groups you want to be remembered by in the left-hand column of the table on the following page. You don't need to include every example provided, but make the list personal. On the right-hand side, describe how you want to be remembered by each group. One way is to use the sentence format: "I want [group] to remember..."

Be specific and make each statement as compelling as you can so that it engages your mind and heart.

## MY LEGACY STATEMENTS

GROUP	LEGACY STATEMENT





## IDENTIFY YOUR ACCOUNTS

No one has enough time to focus on everything. If you want to lead a life of significance and impact, you must identify which areas of your life are most important to you — your priorities.

We call these areas of your life your accounts. These are the areas you identify where you want to intentionally invest your time and energy to increase your net worth in each one.

Remember, these are the areas that are important to you, not your spouse, boss, friends or the rest of the world. They will serve as the foundation for your Life Plan, so they must truly be important and meaningful to you.

We have created a **Living Forward Assessment** to help you evaluate both your progress and passion in the nine most common Life Plan Accounts. This online tool will help you see where you are doing well and identify areas where you may want to invest more time and focus.

[livingforwardassessment.com](https://livingforwardassessment.com)



## STEP 1: IDENTIFY YOUR ACCOUNTS

Think of the areas of your life that are most important to you. Examples include:

- Spouse
- Finance
- Family
- Recreation
- Faith
- Career
- Friends
- Community
- Children
- Health
- Charity
- Self-development

List your accounts below.

## STEP 2: PRIORITIZE YOUR ACCOUNTS

Next, arrange your accounts in priority order. Obviously they are all important, otherwise they wouldn't be on your list. But not all of them have the same importance. Add your accounts to the table below in priority order from most to least important.

<b>1</b>		<b>7</b>	
<b>2</b>		<b>8</b>	
<b>3</b>		<b>9</b>	
<b>4</b>		<b>10</b>	
<b>5</b>		<b>11</b>	
<b>6</b>		<b>12</b>	

## STEP 3: LABEL YOUR ACCOUNT PAGES

Finally, write each account you have chosen at the top of a Life Plan Account Page in the order you listed them above (beginning on page 12).





## CHART YOUR COURSE

**N**ow is the time when you get clear on what you want for each account you've identified to be part of your Life Plan. As part of this process, you will:

- identify your purpose in each account
- get clear on your vision for what you want this account to look like
- take inventory of where you are at today
- determine clear commitments and actions you will take in each account

These account pages will serve as the blueprint for your Life Plan and allow you to chart your course from where you are today to where you want to be in the future so that you can move forward with clarity, confidence and conviction.

Follow the steps on the following pages as you work through each account you've identified.

## STEP 1: DEFINE YOUR PURPOSE

Purpose captures the unique role you and only you can play in that account. Think of it this way. Imagine you were assigned this account. What would be your primary responsibility? What is your role? That is your purpose.

**TIP:** Try to keep your purpose to one sentence that clearly defines your primary responsibility in this area.

## STEP 2: CLARIFY YOUR VISION

Your Envisioned Future is where you paint a clear picture of what you want to see in the future in this account. Here you will describe what this account looks like when it's functioning at its best — as if it's already a reality.

**TIP:** Make your imagination work for you. Employ all five senses and record what you see, using the present tense as if your future has already become true.

## STEP 3: FIND SOME INSPIRATION

Search for an Inspiring Quote that resonates with the core of your future purpose — a verse, proverb, famous saying or anything you find compelling. While this step is optional, many people find this extra inspiration to be motivating and help them connect to their purpose in this account.

**TIP:** Don't spend too much time here the first time you are creating your Life Plan. If something naturally resonates with you, capture it. Otherwise, this is something you can always add later as you live with your Life Plan a bit.

## STEP 4: CAPTURE CURRENT REALITY

This is where you assess where you are today in relationship to your Envisioned Future for each account. The more honest you can be, then the more progress you will see. Make your list so real and personal that you would only share it with one or two people you've positioned in your life for the sake of accountability.

**TIP:** Keep it simple and list these as a series of bullets. Try to write down the first things that come to mind without over-thinking it too much.

## STEP 5: IDENTIFY YOUR COMMITMENTS

In each account, identify specific commitments you will make in order to move closer to your Envisioned Future. What will you do daily, weekly, quarterly or annually to increase your “net worth” in each account?

Each commitment or action should be specific enough that you could add them directly to your calendar. Ambiguity is the enemy of execution.

**TIP:** Be realistic. Remember you still need to work, eat and sleep - and manage the activities in every account. Don't over-commit yourself but instead focus on those commitments that will have the greatest impact on each account.

**If you don't design your own life plan, chances are you'll fall into someone else's plan. And guess what they have planned for you? Not much.**



**Jim Rohn**



**ACCOUNT 1:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 2:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 3:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	



**ACCOUNT 4:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 5:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 6:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	



**ACCOUNT 7:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 8:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 9:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	



**ACCOUNT 10:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 11:** \_\_\_\_\_

**PURPOSE**

**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	

**ACCOUNT 12:** \_\_\_\_\_

**PURPOSE**

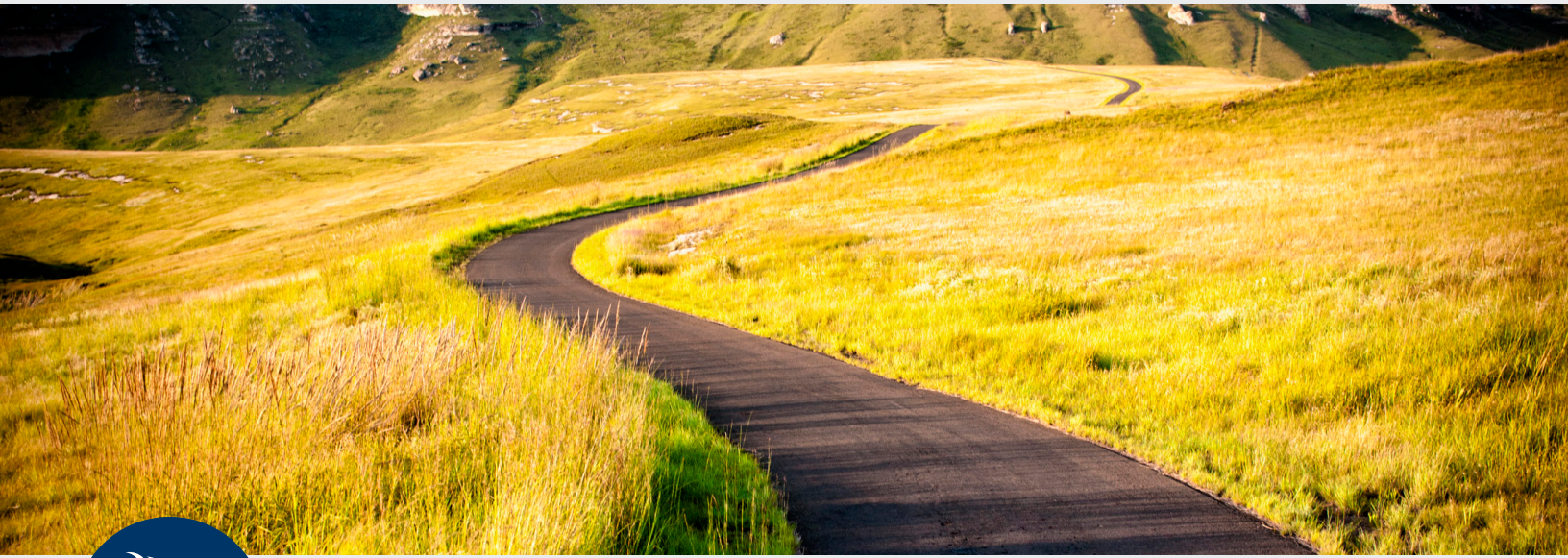
**ENVISIONED FUTURE**

**INSPIRING QUOTE**

**CURRENT REALITY**

**SPECIFIC COMMITMENTS**

1	
2	
3	
4	
5	



## LIVE THE JOURNEY

Once you've completed the first draft of your Life Plan, take a moment to pause and celebrate. You've taken a huge step toward Living Forward with more intention and purpose. But your journey doesn't stop here. Below are some tips to help you to begin using and leveraging your Life Plan.

- **Schedule Your Commitments:** Put the actions you've identified into your calendar and make them a priority.
- **Review Your Plan:** Read your Life Plan daily for the first 90 days; weekly for the rest of your life. If you don't keep reviewing and focusing on your Life Plan, you'll never get the lift or results you want.
- **Share Your Plan:** Find a partner (spouse, friend, mentor or coach) who will both challenge and celebrate with you.

We've coached people on how to lead and live better through Life Planning for more than 20 years. Visit our website for more information and resources to help you on your journey.

[buildingchampions.com/LivingForward](https://buildingchampions.com/LivingForward)

