

Worksheet for Action Planning Dimensions of Your Life
Finance/Money

My Financial Vision Statement (example)

I have a nest egg that allows me to live the life I want and share generously with my family in daily life and special events.



An Image that Triggers my energy—select from your vision board or some other source

My Theme Song:

This song brings me energy, joy, and kindles positive feelings about my financial ideal. Example: I'm Gonna be Rich (Robert Palmer) and If I Had a Million Dollars (Barenaked Ladies)

From the previous work you have gathered, describe the stand-out insights that you want to consider in creating your desired financial future.

What are the first, essential actions necessary to achieve your envisioned financial future.

Identify what, if any, support you will need to implement your financial vision

List the on-going steps required to fulfill and sustain your financial vision.

What other life areas support or influence success of your desired financial future?

What needs to happen in those areas to create a positive synergy?