

How to complete your *SIMPLE Personal Plan*

1. Save this document to your computer
2. Re-open the document
3. Type directly into the template, save, and print your *SIMPLE Personal Plan*.

How to Use the Template

Write your responses to the questions in the space provided. Once you complete the guide you may also want to type your *SIMPLE Personal Plan* document.

Once you complete it, print it out and review it daily for the first 90 days. Place it somewhere you will see it daily. After the first 90 days, you should review it weekly.

Notes

Your actions may need to be revised to be more detailed or less detailed as you make progress in these areas. When you feel like you're struggling in a particular area or several areas – that's normal. Set aside some time to come back to your *SIMPLE Personal Plan*. Review it. Get reset. Then move forward again.

Investing the time today in your *SIMPLE Personal Plan* will bring dramatic improvements to your life, work, and relationships. It will significantly increase your chances for successfully achieving your personal and professional goals.

Here we go – it's time to complete your *SIMPLE Personal Plan*!

Name _____

Date _____

Who is there?

Who do you expect to attend your funeral? Who are these most important people in your life? This could be individuals or groups of people – children, spouse, friends, colleagues, friends, etc.?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

What will they say?

List each person and what would you like for them to say about you at your funeral? What do they remember most about you? What impact did your life have? What have they lost with your passing?

1.

2.

3.

4.

5.

6.

7.

Who is most important?

List the relationships you noted above and answer the following...

Relationship	How could this relationship be improved?	What has to happen in order for this relationship to better?
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Priorities

What is most important to me?

1. Think of the areas of your life that are most important to you and list them below (i.e. spirituality, children, finance, self-development, friends, fun, ministry, spouse, health, career, family, vacation, charity, etc.).
2. Number them in order of priority.
3. Assess where you are currently in each account using a 1 to 10 scale (1 is strongly lacking and 10 is totally fulfilled in this area).

SIMPLE Personal Plan Account	Priority	Where am I now?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Now, use the following forms to complete your *SIMPLE Personal Plan*. Keep in mind that you will complete one form for each *SIMPLE Personal Plan* account listed above.

SIMPLE Personal Plan Account

Account _____

Future

Visualize, dream, clarify where you want to be 20 or 30 years from now in this account. Write it like you would write a story that describes a day in your life – in your future. What do you see when you look into the future for this account?

Purpose

Now, based on the future you just described, define your purpose for this account - the clear and concise end result you desire in this account. Why is this account important to you? Keep it simple. One sentence. This must be a purpose you can fully embrace. Start with, “My purpose is to...”

My Purpose is to

Basis

A Scripture verse is optional, of course. It may not be important to you. But it is important to some who want their life to be built on transcendent values that have stood the test of time.

Reality

Now it's time to be brutally honest with yourself. Where are you in relationship to your Future? How could this area improve? Don't pull any punches. The more honest you can be, the more progress you will see. Try to write down the first things that come to mind without too much analysis.

Actions

List 2 to 3 actions that you must commit to immediately to move from your Reality to your Future – to build equity in this account. What specific disciplines will you do to see immediate improvement in this account – daily, weekly, monthly? It is important that you limit your Actions to no more than 3. These disciplines should be so brutally specific that you can enter them into your calendar on a specific day at a specific time.

Once you complete the form for this Account, reorder the items in this order:

Purpose, Basis, Future, Reality, Actions.

Notes for my SIMPLE Personal Plan

