

BEGIN WITH A LIFE WELL LIVED IN MIND

Design the life your financial plan is supposed to support.

You've worked incredibly hard to create options. Before deciding what those options should cost-or how to fund them-start with a more important question: What do you actually want your life to look like?



01 — LOOK

Before you design what's next, look at what's already here.

Complete the first reflections individually. Then compare your answers and build your shared Life Well Lived together.

If the next five years looked a lot like the last seven days,

REST

What truly refilled your tank?

REJUVENATE

What gave you energy, connection, meaning or enjoyment?

DEplete

What consistently took more than it gave?

REFLECT

Looking at the last seven days, what do you want more of—and what are you ready to leave behind?

**“Your calendar is already creating a life.
The question is whether it's the one you would choose.”**

Make your Life Well Lived observable.

Forget retirement for a minute. Don't picture the highlight reel. Picture an ordinary Tuesday in a life you love.



- Where do you wake up?
- What role does medicine play in your day?
- When does work actually end?
- What have you delegated or stopped doing?
- What does your health look like?
- What does your morning look like?
- How much are you working?
- Who gets your evenings?
- Where are you living?
- What does an ordinary week feel like?

MY ORDINARY TUESDAY

“If you can’t describe the Tuesday, you don’t have a Vision yet. You have a wish.”

03 — ZOOM OUT

What do you want your normal life to contain?

You don't need an answer for every category. Use these prompts to notice what belongs in your Life Well Lived.

**TIME**

How much control do you want over your schedule?

WORK

What relationship do you want with medicine?

FAMILY + RELATIONSHIPS

What do you want to be present for?

HOME + PLACE

Where and how do you want to live?

EXPERIENCES

Travel, adventures, traditions, time away?

HEALTH

What would taking great care of yourself look like?

LIFESTYLE

What would you love to enjoy, experience, own, join or outsource?

Home • car • club/community • help at home • hobbies • training •

IMPACT

What do you want your time, career and resources to make possible?

“There are no financially ‘correct’ answers on this page. The question is whether the life is yours.”

Your Life Well Lived doesn't have to exist only someday.

Over the next 12 months, what do you want MORE of in your life?



MORE OF

LESS OF

WHAT I WANT TO LEAVE BEHIND

WHAT I WANT TO BRING FORWARD

What gave you an outsized amount of happiness, connection, energy or meaning that you want more of?

ONE PIECE TO BEGIN

What is ONE piece of your Life Well Lived you want to bring into the next 12 months?

The trip. More dinners together. Hiring help. Fewer extra shifts. Better health. Joining the gym. Protecting Fridays. More time outside. Seeing your parents more. Finally using the vacation days.

“You don’t have to create the entire life today. Start bringing pieces of it closer.”

05 — CAPTURE

We're building a life where...

THREE THINGS WE WANT MORE OF OVER THE NEXT 12 MONTHS

1.
2.
3.

ONE THING WE'VE BEEN TREATING AS FIXED THAT MIGHT ACTUALLY BE NEGOTIABLE

Schedule / call / workload / location / outsourcing / something else.

ONE PIECE WE'RE READY TO BEGIN

You've decided what matters. Now you can see what you're building.

What has to become true financially to create this life?

That's where Financial Goals begins.