



Date: _____

Life Design and Planning

My Reading (R)

(R) *Work*

- 0 ► I work very long hours on an ongoing basis, and will do this until I retire, then I will stop.
- 1 ► I work too much at a job I don't particularly like so I am beginning to think about change.
- 2 ► I work hard and usually enjoy my work but my work-life balance could be improved.
- 3 ► I love my work and my work meets basic needs but work does not dictate my life choices.

(R) *Relationships*

- 0 ► I am estranged from some of my immediate family members, and have no close friends.
- 1 ► My family and friend relationships are weak and not very supportive to me emotionally.
- 2 ► I have good supportive relationships with family and friends but I take them for granted.
- 3 ► I have, I nurture, and I rely upon close relationships with my family and with my friends.

(R) *Health*

- 0 ► I am not physically or emotionally healthy and am not doing anything to improve that.
- 1 ► I feel fine, so I do not believe that I am unhealthy, and mostly my head is in the sand.
- 2 ► I am relatively healthy and go for regular check-ups, but I am not disciplined about it.
- 3 ► I am healthy and continually focus on maintaining good physical and emotional health.

(R) *Activities*

- 0 ► I do not have any activities in my life, and have no ideas as to what activities I want.
- 1 ► I have an activity or two that fill time, but my level of enjoyment is low.
- 2 ► I have activities in my life that I like but need to find ways to spend more time at them.
- 3 ► I have activities in my life that suspend time and that are very meaningful and fulfilling.

(R) *Stress*

- 0 ► I am constantly stressed in most areas of my life, and do nothing to manage that stress.
- 1 ► I know that my levels of stress are frequently too high but I really don't have a choice.
- 2 ► I am sometimes over-stressed and deal with it but haven't dealt with underlying causes.
- 3 ► I experience normal levels of stress, and my stress management approach works well.

(R) *Diet*

- 0 ► I never watch my diet, and frequently eat foods that I know are not good for my health.
- 1 ► I watch my diet only when it is convenient, and does not require too much self-sacrifice.
- 2 ► I usually maintain a well-balanced diet, but occasionally I fall of the wagon.
- 3 ► I maintain a well-balanced diet on a daily basis, and review it regularly with my doctor.



Date: _____

Life Design and Planning

My Reading (R)

(R) Exercise

- 0 ► I never exercise, I am in poor shape, and I am not really motivated to do anything about it.
- 1 ► I exercise occasionally, and only when it is for fun, which usually means I hurt afterwards.
- 2 ► I exercise often, but not as often as I need to because other areas of my life get in the way.
- 3 ► I exercise on a regular basis to manage stress and help maintain my physical health.

(R) Intellect

- 0 ► I do nothing to challenge myself mentally, and don't care to learn anything new.
- 1 ► I do not welcome mental challenge but can force myself to be up to the task if necessary.
- 2 ► I like and look for intellectual stimulation in my work, but not so much outside of work.
- 3 ► I constantly challenge my mind, and am always exploring new learning opportunities.

(R) Attitude

- 0 ► I am pessimistic by nature; I fear life changes, and I do not look forward to retirement.
- 1 ► I am often looking at life and life changes with my glass half empty, not getting engaged.
- 2 ► I am optimistic most of the time, catching myself when I am not and adjusting my outlook.
- 3 ► I have and maintain a positive attitude about life and life changes, including retirement.

(R) Money

- 0 ► I have no sizable investments or financial plans, and am not saving enough for my future.
- 1 ► I have intentions to plan my finances and to save more, but haven't moved forward.
- 2 ► I have financial plans and investments that I am happy with but need to review and update.
- 3 ► I have a solid financial plan in place, and am doing my utmost to invest for my retirement.

Total Reading (R):

Shade in the boxes, from left to right, up to your total reading.

0 5 10 15 20 25 30

--	--	--	--	--	--

It is not too late for me to make some important new life choices.

I have begun to change and to see healthy improvement.

My lifestyle is nearing the point that I am striving to get to.

My lifestyle is healthy and is exactly how I plan to keep it.