



LIFE TRANSITION SPECIALISTS

LifePrinting™

Exercises

Navigating Life's Transitions

LifePrinting™

Welcome to the first step of the RPG LifePrint Advantage™ process - *LifePrinting™* !

Navigating the maze of financial decisions is daunting; and for those in a life transition, the stakes couldn't be any higher.

To support your journey, we've developed The LifePrint Advantage™, a proprietary and educational approach to financial life mapping and wealth management based on an in-depth, multi-faceted understanding of you. Like a fingerprint, your LifePrint™ is unique, it's personal and with our help, it's the path you'll take to achieve your goals.

To best educate and assist you on your journey, it is helpful for you to define your personal values, purpose, vision and goals. Once you have a clear understanding of these non-financial components, we will tailor a strategy that identifies what may be required of you, financially, to realize your goals and dreams and make your vision a reality.

As we embark on our journey, it's important to be thankful for all of the wonderful things in life that money can't buy and to ultimately achieve TRUE WEALTH!

Let's Embark!

Step #1 – Identify What You Value Most

Values

All people have certain principles and values they believe in and live by. These are the innermost beliefs that distinguish who we are and how we conduct ourselves. Values are things that are very important to us. They include such aspects of life as family, health, career, and spirituality. Having strong convictions about what we value and keeping them front and center in our lives keeps us balanced and focused on the most important things. In the long run, focusing on what you value, coupled with solid principles, will help you live a fulfilling life that is far more satisfying than any short-term gain from compromising.

Having these strong convictions benefits you in other ways, too. In times of indecision, you can turn to your guiding values. They will frequently give you the framework for making tough decisions. When you're unhappy, you can turn to your values and see if you're leading a life that is consistent with your beliefs. When you're underachieving, you can turn to your values and gain the motivation to make the extra effort.

Decision Making:

Have you ever had trouble making a decision? In business and in life, we have to make decisions all the time. Many of them involve "gray" areas where more than one solution will work. Indecisiveness results when you are not clear on your values. Once you bring clarity to your values, making decisions becomes easy.

Happiness:

Far too many people in our society go through life without zest and enthusiasm. Frequently, this is because they are doing things and being things that are not congruent with who they are. The result can be burnout, depression, and ineffectiveness. The key is to check what is important to you and then make sure your life is in sync with that.

Achievement:

Some of the greatest fulfillment in life has come from people who felt so strongly in their values that they were willing to devote their lives, and in some cases, sacrifice their lives, to live them. The key is to feel so strongly about your values that you are motivated to take action and live by them. Having conviction about something you value, and then committing to living by it every single day, will go a long way toward igniting your relentless burning desire.

Identify What You Value Most

In this exercise, you'll identify what you value most in life and then rank them from most important to least important. Examples that might appear on your list include:

Family – Health – Spiritual Fulfillment – Love – Relationships – Generosity – Adventure – Achievement – Passion – Creativity – Leaving a Legacy – Fun/Happiness – Positive Attitude – Learning – Helping Others – Simplicity – Financial Security – Peace of Mind – Respect – Gratitude – Abundance – Compassion – Faith – Growth – Honesty – Integrity – Kindness – Selflessness – Significance – Vitality – Wisdom – Intimacy – Security – Peace

Directions: List at least six things you value most in life and then rank them in order of importance. Then, indicate the actual percentage of time you spend living and supporting these values.

Things I value most in life are:

Value	Rank	% of Time

Identify What You Value Most

Take a close look at your list. Are you spending a lot of time living and supporting your values?

Remember: values are not some fluffy ideal. They need to be fundamental to who you are as a human being. With that said, some of your values may change over time due to changing circumstances in your life. What's important to you today may not be as important to you five years from now. Consequently, it's important to review your values on a regular basis to make sure they are still important to you.

To get more focused on your values, restate your top six values in the chart below, then list one key action you can implement that will help you more fully integrate that value into your life. For example, let's say health is one of your top six values. Here's how that line on the chart might look:

Value	Action to integrate it more fully into my life
1. Health	Exercise at least 30 minutes a day, 5 days a week.

Now complete the full chart:

Value	Action to integrate it more fully into my life
1.	
2.	
3.	
4.	
5.	
6.	

You'll refer to this chart a little later as you work on developing your goals. Long term, to keep your values top of mind, review this list on a regular basis.

Step #2 – Find Your Meaningful Purpose

Purpose

We all have certain desires and pursuits in life such as ensuring our security and caring for loved ones. But, when we move beyond the day-to-day pursuits of life, what moves you? What causes you to jump out of bed in the morning feeling refreshed and ready to tackle the day's challenges? What higher purpose calls you? What is something larger than yourself that inspires you? What can you do that uses all your skills, talents, and interests, and that benefits the world?

Without meaningful purpose, we simply go through the motions of daily life. We respond to the alarm clock, we go to work, we solve the day's problems, we eat, we relax, we spend a few minutes with the family, we go to bed, and then we wake up and do it all over again. We could do that for 50 years and then look back on what we've accomplished and be sadly disappointed at how much time we spent accomplishing so little. Each of us is capable of making a very positive impact in the life we live.

For many people, being a loving spouse and raising great kids is a huge accomplishment, and they should be rightfully proud of that. Meaningful purpose goes a step beyond and transcends what we do for ourselves and our immediate family. Meaningful purpose reaches out to the world around us and infuses life with the special gifts that each of us have inside.

Find Your Meaningful Purpose

The following exercise is designed to help you identify, unlock, and pursue your meaningful purpose so the world can benefit from your unique gifts. Below are a series of questions and your objective is to reflect on them, write your response, and then consciously decide how you are going to move forward living your life with meaningful purpose.

1. Are you committed to finding your meaningful purpose in life and, if so, what has happened in your life that now makes you ready?
2. What are your unique gifts, i.e., what do you do extremely well?
3. What do you value most in life? (Restate your top values from Step #1)
4. What activities are you most passionate about? For example, what gives you a great feeling of satisfaction and fulfillment?

Find Your Meaningful Purpose

5. What social issues are you so passionate about that you would write an editorial in your local newspaper advocating your position?

6. Given a choice, do you prefer to help people by rolling up your sleeves and pitching in, or do you prefer a more behind the scenes role? Give examples of the types of activities you like to do based on your response.

7. When you feel empty and directionless in life, what is missing in your life during those times that is causing you to feel that way?

8. How are you nourishing your soul spiritually?

9. Is your spouse/significant other supportive in your desire to more fully live your meaningful purpose? If not, how are you reconciling that?

Find Your Meaningful Purpose

10. How do you go about making an important decision about your life direction? Is it made from a surface level, or do you have a way of checking into your soul? Do you have a confidant that you can share your thoughts with who can help guide you?

11. Do you view a lack of money as an impediment to fully realizing your meaningful purpose? If so, what are some creative ways that you can get past this issue?

12. If you live your life with meaningful purpose, how will the world be a better place?

13. How will you know that you are living your life with meaningful purpose?

Find Your Meaningful Purpose

“Find a purpose in life so big it will challenge every capacity to be at your best.”

- David O. McKay

Based on your answers to the previous questions, take some time now to jot down your thoughts on what your purpose in life may be. Granted, this is a tall order, but you have to start somewhere. Make some notes, then set it aside for a while and let it sink in. Revisit what you wrote and see if it still feels congruent. Continue this process until you come to the “aha” moment and you know you’ve got it!

MEANINGFUL PURPOSE NOTES

Step #3 – Create a Compelling Vision of Your Future

Vision

There's an old saying, "If you don't know where you're going, any road will get you there." That's a recipe for mediocrity. People of great achievement know exactly where they're going and they take the necessary steps to get there. But, where is "there" for you?

"There" is your ideal future scenario. This is the dream life and dream business you would create if you had absolutely no constraints and could simply wave a magic wand and make it happen. It's your vision for your environmental surroundings, the people you associate with, what you spend your time doing, and what you want to accomplish. It's different for everybody. For example, perhaps you want to be successfully self-employed, working from home, and living in the mountains. Or, perhaps you want to work for a non-profit organization that speaks to your heart and live near your children and grandchildren. It can be anything, but it must be something and it must be clearly defined. It must include tangibles so you can see it, feel it, touch it, smell it, and hear it so you can get all your senses involved in helping you drive toward it.

Your vision must be compelling. It must be something that motivates you to jump out of bed in the morning and get working. Your vision is what will sustain you when the going gets tough and you face major obstacles. To develop it, disengage from the present and position yourself in a future with unlimited possibilities. Eliminate your limiting beliefs and think big. With this frame of mind, you can develop a vision that propels you to success, contribution, and happiness far beyond what you've ever imagined.

The key to your compelling vision is to create one that motivates you to take action and that helps you persevere even when times are difficult. Here's an example of a compelling vision of the future:

"I enthusiastically jump out of bed every morning full of love for God, family, friends, and life. I am a husband my wife is proud of, a father my children look up to, and a friend people count on.

Create a Compelling Vision of Your Future

My family is financially secure, physically fit, and emotionally close. We live in a comfortable home on one acre with a postcard-perfect view of the Pacific Ocean. Our home is light and airy with crisp ocean breezes blowing through. Pictures of my family and special moments in our life line the walls. The sound of grandchildren fills the house. As I look out the window, I see waves lapping the shore, seals playing on the rocks, and surfers hanging ten.

My days are spent helping the people around me reach their fullest potential. I do this by meeting with my top clients, guiding them in reaching their dreams and aspirations, and communicating my wisdom through my life planning website. My financial success enables me to be a reverse tither and I give away 90% of my income and live on 10%. My schedule is flexible and I spend several hours a week mentoring disadvantaged children. For recreation, my wife and I travel the world, visit our kids and grandkids, read, and take time to enjoy the beauty of the great outdoors.

When I go to bed at night, I sleep soundly knowing that I helped make the world a little better than it was when I woke up.”

Create a Compelling Vision of Your Future

In this exercise, you'll paint a picture of your compelling vision.

Directions: Don't hold back. Finish each statement as accurately and completely as possible. This is your future, so make it a great one!

My ideal working environment is...

The relationships I want to surround myself with include...

Create a Compelling Vision of Your Future

I want to spend my days working on...

If I wasn't so afraid, I would...

My life will not be complete unless I...

Create a Compelling Vision of Your Future

If I knew for certain that I would die peacefully in either 14 days or 14 weeks (and I didn't know which of these two dates I would die), I would do the following in the next 14 days...

And I would do the following in the remaining 12 weeks (assuming I live that long)...

If I had all the money I ever needed, I would spend the rest of my life...

Create a Compelling Vision of Your Future

I want people to remember me by saying I was...

My most memorable experiences include...

The part of my weekly routine that I look forward to is...

Create a Compelling Vision of Your Future

I feel alive and energetic after I have just...

The community/world issue that I feel most strongly about is...

It may seem impossible today, but my life would dramatically improve if...

Put It All Together

Review how you finished all the previous statements. From this, use the following outline to write a compelling vision that motivates you to take action and that gives you great excitement from just thinking about it.

My compelling vision is to...

Surround myself with...

Live in...

Spend my days...

Accomplish...

Once you create a compelling vision that gives you goose bumps, review it on a daily basis to continue hardwiring it into your life so it will keep inspiring you.

Step 4 Goals

Sample – One-Year Goals

Dreams

We all have wants and desires. We all daydream about what it would be like to be living our ideal life. Unfortunately, despite what “The Secret” says, merely thinking about our ideal life will not get us our ideal life. We have to be clear about what we want, when we want it, why we want it, and we have to take positive action to make it happen. The goal-setting process is critical to making all this happen. As we set goals, make sure they are SMAC-certified – Specific, Measurable, Achievable, and Compatible.

One of the keys to goal-setting is to tie them into your compelling vision. Your compelling vision is a lifetime pursuit. To make that manageable, you have to break it into pieces. To do this, complete the goal-setting and action planning exercises. As you set goals, start by reviewing your compelling vision and then work backwards. To pursue your vision, what has to happen in 10 years, 5 years, 3 years, and 1 year? Determine what age you, your spouse, and your children will be at each of those time periods. Identify the goal, then determine the one activity that will have the greatest impact on reaching that goal. Also, identify the reward you will get by reaching the goal. Here are examples of categories in which you might want to set goals:

- Attitude – are there any attitudes or limiting beliefs you need to change in order to reach your compelling vision?
- Career – what do you want to accomplish in your professional life?
- Education – do you need additional knowledge that will help you pursue your vision?
- Family – how can you improve your relationships?
- Financial – what net worth are you striving for? What business financial goals do you have?
- Physical – what specific physical goals can you set? Do you want to be a certain weight? Do you want to exercise a certain amount? Is there a challenging physical goal you’d like to achieve such as climbing Mount Rainier?
- Recreation – what do you want to do in your free time that will rejuvenate you?
- Community – what do you want to do for your community? What legacy do you want to leave?
- Spiritual – how do you want to grow in your spirituality?

Once you’ve set your goals, transfer them to the Visualize and Realize page coming up. This will neatly summarize your compelling vision and all the activities that have to take place to make it happen.

GOAL	KEY ACTIVITY TO ACHIEVE	REWARD
Change my belief system from scarcity to abundance	Read appropriate books and listen to the right speakers and take them to heart	A better outlook on life
Take a two-week family vacation	Schedule it	Grow closer as a family, smiling faces, new experiences
Exercise vigorously at least 5 days per week	Join the local health club, get up by 5:15 a.m., hire a personal trainer for 6 months	Great health, feel good, more energy
Break 80 in golf	More practice and focus on eliminating double bogies	New set of clubs
Become a member of the leadership team at my place of worship	Express my desire and follow the protocol to obtain the position	Being able to help people
Meditate at least 15 minutes a day	Find a consistent time that works and create a peaceful space	Stress reduction, clear mind, greater understanding
Spend 5 hours per week helping kids with homework or as much time as needed	Let kids know I'm available and make it a priority	Smarter, happier kids, satisfaction from helping, grow closer to the kids

Directions: On the following pages, write down your goals for the next 1-, 3-, 5-, and 10-year periods. After that, transfer the goals that relate to you achieving your compelling vision on the Visualize and Realize page.

One-Year Goals

My Age:

Spouse's Age:

Kids' Ages:

GOAL

KEY ACTIVITY TO ACHIEVE

REWARD

Three-Year Goals

My Age:

Spouse's Age:

Kids' Ages:

GOAL

KEY ACTIVITY TO ACHIEVE

REWARD

Five-Year Goals

My Age:

Spouse's Age:

Kids' Ages:

GOAL

KEY ACTIVITY TO ACHIEVE

REWARD

Ten-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
GOAL	KEY ACTIVITY TO ACHIEVE	REWARD

Visualize & Realize

Year One Goals

Year Five Goals

**Write your
compelling vision
here.**

Year Three Goals

Year Ten Goals

Navigating Life's Transitions

LifePrinting™

Congratulations!

You have now completed your *LifePrinting™* exercise. This is the first step to achieving TRUE WEALTH!

The next step in the LifePrint Advantage™ process is to prepare a comprehensive analysis, which may include retirement, education and specific goal funding analyses; followed by an extensive portfolio, insurance, estate and tax planning review which culminates with specific recommendations.

Call and schedule your appointment today to continue your navigation of the LifePrint Advantage™!



LIFE TRANSITION SPECIALISTS

RPG – Life Transition Specialists
2610 Lake Cook Road, Suite 250
Riverwoods, Illinois 60015
Phone: 847.559.0800
Fax: 847.559.0867
info@rpgplan.com