

Important Note

This is the condensed workbook with no images and reduced pages to allow for easier, at-home printing.

Page numbers and layout may slightly differ from the full workbook

Visit www.abetterlife.com/2024workbook for the full workbook

Reflections

Ten years ago, I/we...

Three years ago, I/we..

One year ago, I/we...

Gratitude

Aspects about your health or abilities you are thankful for...

People in your life you love...

Amazing places you've been to and seen...

Amazing things about the place you live now...

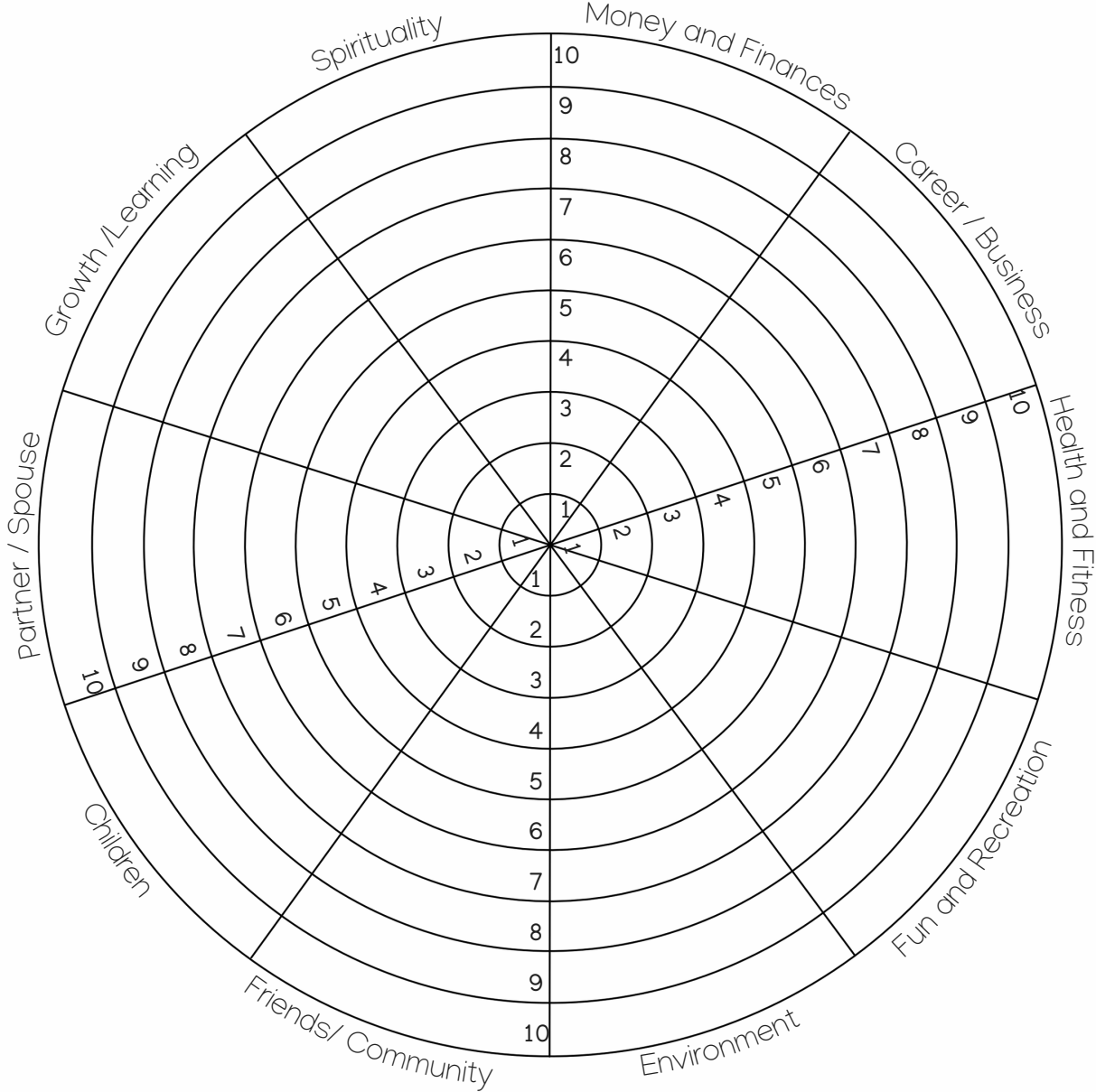
Unique personal abilities you have / something you're awesome at...

Something you've overcome...

Unique opportunities you've had in your life...

What is something you worked incredibly hard on and successfully achieved?

The BetterLife Wheel



The three areas I feel I am doing the best in are...

- 1.) _____
- 2.) _____
- 3.) _____

The three areas I most want to improve in are...

- 1.) _____
- 2.) _____
- 3.) _____

A Five-Year View of the Future You

When I wake up in the morning, I like to...

Some cool things I own are ...

When people talk about me, they say I am...

I typically work ____ hours per week, primarily focusing on...

Some of my hobbies are...

When others look at me, physically they see...

Some of the bad habits I am great at avoiding are ...

Some of the habits I do consistently are ...

A Five-Year View of the Future You (Couple)

What does our family look like?

Some cool things we do together are...

Something awesome we recently did...

Something amazing we recently bought...

What are our family values?

When others look at us, physically they see...

When others see how well our relationship works, they often say...

The number one thing that helped strengthen our relationship these past five years was...

The Five-Year Future You: Real Estate Edition

What kind of real estate do you invest in?

How much are you earning from your active income this year?

How many deals are you doing per year?

How much are you earning from your passive income this year?

What kind of deals are they?

How much capital are you investing this year?

How many units do you own or syndications have you invested in?

How is your business organized? Do you have a team, or are you solo?

How are you funding these deals and opportunities?

How do you find deals and opportunities?

What does your team look like?

What's your deal pipeline look like?

Where are you investing?

What is your net worth?

What is your role?

Anything else?

How much are you working?

SMARTER Goals

Specific

Vague goals lead to vague plans, which leads to inaction. Ensure your goal is spelled out with detail, leaving no question as to whether or not the goal was achieved.

Measurable

Your goal should have quantifiable metrics that let you know what success looks like, what failure looks like, and where you are at any given moment on the path.

Actionable

The goal should be something that you, *personally*, can take specific actions to achieve. You're not just waiting or hoping something else makes your goal happen.

Relevant

Does your goal line up with the vision of the life you want to lead? Does it get you closer to your Five-Year Future You?

Time-bound

A goal without a deadline is a wish. Make sure your goal has a definitive timeline for completion.

Exciting

Does your goal actually fire you up? If it doesn't make you want to pop out of bed to achieve it, ask yourself: what will?

Risky

Is there a chance of failure in pursuit of this goal? Good! Don't settle for what's easy, reach for what's possible but not guaranteed!

Money & Finance

Where am I at with this area of my life?

What did I do amazing in this category over this past year?

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Where do I want to be in five years?
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Who do I know is currently crushing this goal easily? What do they do regularly?

What do I need to do *this year* to be on track to hit that five-year vision?

What do I need to do *this quarter* to accomplish this annual goal?

Other Questions to Consider and Discuss

- What does my charitable giving look like - and where do I want it?
- What is my savings target?
- One area of finances I struggle with is...
- A financial habit I'd like to work on improving is...
- Is my emergency fund sufficient?
- How will I fund my kid's education - or will I?
- What would happen if I lost my job?
- Have I planned for any expected changes in my living expenses?
- How am I doing with consumer debt?
- What's my plan for paying off debt?
- How can I improve my credit rating?
- How much of my income should go toward my housing?
- How much of my income should go toward my vehicle?
- How much of my income should go toward my investing?
- How will I manage finances with my spouse or partner?
- Where am I being irresponsible with my finances?

■ 's 2024

ANNUAL GOAL

—Andrew Carnegie

- Finances
- Career
- Health
- Recreation
- Environment
- Friends
- Children
- Spouse
- Growth
- Spirituality

By the end of 2024, I will...

I must accomplish this goal because...

Goal Type

- Outcome
- Character
- Process
- Learning

Along the way to achieving this goal, I must...

The following habits, processes, &/or actions will help me reach this goal:

By the end of Q1, I will...

By the end of Q2, I will...

By the end of Q3, I will...

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By the end of 2024, I will...

Specific

Measurable

Actionable

Relevant

Time-bound

Exciting

Risky

By the end of Q1, 2024, I will...

Specific

Measurable

Actionable

Relevant

Time-bound

Exciting

Risky

The following actions, habits, or constraints will help me achieve this quarterly goal...

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Health & Fitness

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Other Questions to Consider and Discuss

- What is your current weight?
- When you look in the mirror, what do you see/think...
- One sport or physical activity you want to do more of is...
- Do you love yourself as-is? Why or why not?
- Are you sleeping enough? What can you do to improve?
- Do you feel unattractive?
- How do you usually cope with stress?
- What is one key way you can easily start eating healthier?
- Who in your life is willing to support you? Who isn't?
- What do you think the biggest fitness roadblocks is?
- Do you have enough quiet time with yourself?
- Do you follow a certain diet? Why or why not?
- Have you struggled with dieting? Why or why not?
- Is there a negative health habit you need to stop doing?
- Do you often find yourself under stress?
- Are you consistent about taking your medication?

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Fun & Recreation

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Other Questions to Consider and Discuss

- Somewhere you want to travel this year is...
- You feel SO alive and in flow when you are ...
- One thing you do (or want to do) that has zero financial benefit is...
- How many books do you want to read this year?
- What risk would you take if you knew you could not fail?
- What are the top five things you cherish in your life?
- When do you stop calculating risk and rewards, and just do it?
- Who, in your life, epitomizes "joy" ?
- What would you say is one thing you'd like to change in the world?
- Have you been the kind of friend you'd want as one?
- What do you need to change in order to be happy?
- When you're 90, what will you regret about your life?
- What do you want your 90-year old self to be proud of?
- What small thing can you incorporate into your life each day that will bring you just a little more joy?
- Who or what is robbing you of your joy?

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Your Environment & Location

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Other Questions to Consider and Discuss

- Do you love where you live? Does it make you happy?
- What don't you love about your environment?
- What do you love about your home?
- What do you dislike about your home?
- What projects at home have you been putting off?
- Where do you need to get on the same page with your significant regarding your location?
- Do you have a place you can go to relax?
- Do you need to move soon? Where?
- Why would you move? Why would you NOT move?
- How can you appreciate your local environment more?
- How does your family feel about their environment?
- What does your workspace look like? Feel like? Does it make you work with enthusiasm?
- How do you feel when you look out of your office window?
- How do you feel about what you drive each day?

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Friends, Relatives, & Community

Where am I at with this area of my life?

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Other Questions to Consider and Discuss

- Do you call your parents enough?
- Is there a friendship you need to end?
- Is there a friendship you need to rekindle?
- How are you a good friend?
- How have you grown over the past year as a friend?
- Who do you need to make more time for?
- Can you trust your friends? Can they trust you?
- Is your friendship mutually beneficial?
- Do you gossip about your friends?
- Are any of your friendships lopsided?
- How are you getting yourself involved in your community?
- What civic organizations have you been involved with?
- Who do you need to have a hard conversation with?

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Children

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Other Questions to Consider and Discuss

- How often do you want to take your kids out on a one-on-one "date?"
- What is your biggest strength as a parent? What is your biggest weakness?
- How have you grown over the past year as a parent?
- Are you on your phone too much when around your kids?
- What do you most enjoy and appreciate about each person in your family?
- Do you have boundaries in place to protect your family time and values?
- What memories do you hope your children have of this year?
- What are your fears or concerns about your child in this year of school?
- What needs to change in your life as a parent?

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Romantic Partner or Spouse

Where am I at with this area of my life?

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Other Questions to Consider and Discuss

- How do you make your relationship a priority in your busy life?
- Are you happy with the intimacy you share?
- Do you feel the same the way you felt for your partner at the beginning of the relationship?
- When was the last time you said "I love you" to your partner?
- What do you need to change about yourself to benefit your partner?
- Do you make sacrifices for your relationship?
- What do you like or love about your partner?
- Are you having enough sex? Does your partner think so?
- What can you do to be more aligned on your goals / beliefs around sex?
- How often do you laugh together?
- What was the best moment in your relationship so far?
- How do you show your love for each other?

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Growth & Learning

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Other Questions to Consider and Discuss

- What do you want to learn next?
- Are you surrounded by the right people who will challenge you?
- Are you taking on enough challenges?
- What new skill should you learn?
- Are you reading enough?
- Where are you taking the easy/safe route when you should be challenging yourself with the harder path?
- What are you passionate about?
- What would you pursue if you knew you couldn't fail?
- Where are you letting yourself off the hook?
- What are you not ready to change yet?
- Who do you look up to, and why?
- If you had a billion dollars, what would you do all day?
- How do you sabotage your own success?
- How do you best like to learn?

■ 's

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Spirituality

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Other Questions to Consider and Discuss

- Who is God to you?
- During difficult times, how do you cope and where do you turn for comfort?
- Where and how do you find meaning and purpose in your life?
- Is your belief and/or relationship to God improving or declining?
- What are your values and are they guiding your decisions?
- Are you a more spiritual person now, or in the past?
- When, in your past, did you feel most connected to God?
- What has held you back from deepening your spirituality?
- What do you believe about life after death? How does that affect how you live?
- Do you have your own faith, or your parents faith?
- What can you do on a daily basis to become the spiritual person you want to be?

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Goal Type

- Outcome
- Process
- Character
- Learning

Along the way to achieving this goal, I must...

The following habits, processes, &/or actions will help me reach this goal:

By the end of Q1, I will...

By the end of Q2, I will...

By the end of Q3, I will...

■ 's 2024

ANNUAL GOAL 2

- Finances
- Career
- Health
- Recreation
- Environment
- Friends
- Children
- Spouse
- Growth
- Spirituality

“If you want to be happy, set a goal that commands your thoughts, liberates your energy and inspires your hopes.”

-Andrew Carnegie

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By the end of Q3, I will...

■ 's

QUARTERLY GOAL

- Money / Finance
- Career / Business
- Health / Fitness
- Fun / Recreation
- Environment
- Friends / Community
- Children
- Partner / Spouse
- Growth / Learning
- Spirituality



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By , I will...

I must accomplish this goal because...

Along the way to achieving this goal, I must accomplish the following benchmarks: (optional)

The following habits, processes, &/or actions will help me reach this goal:

Now, go place these habits on the Weekly Habit Tracker, week 1!

When I accomplish this goal, I will...

If I do not accomplish this goal, I will...

■ 's

QUARTERLY GOAL 2

- Money / Finance
- Career / Business
- Health / Fitness
- Fun / Recreation
- Environment
- Friends / Community
- Children
- Partner / Spouse
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QUARTERLY GOAL 3

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- Career / Business
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When I accomplish this goal, I will...

If I do not accomplish this goal, I will...

Quarterly Habits, Actions, and Constraints **Brainstorm:**

Goal 1 The following are some regular actions, habits, or constraints that will help me hit my goal.

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Goal 2 The following are some regular actions, habits, or constraints that will help me hit my goal.

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Goal 3 The following are some regular actions, habits, or constraints that will help me hit my goal.

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Other possible actions, habits, or constraints I want to track:

May or may not be related to your goals.

- | | |
|----|-----|
| 1. | 9. |
| 2. | 10. |
| 3. | 11. |
| 4. | 12. |
| 5. | 13. |
| 6. | 14. |
| 7. | 15. |
| 8. | 16. |

ACTION TRACKER

"You get the results of what you repeatedly do."

Week of to

Goal #1

Goal #2

Goal #3

| Habit / Process | Target | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Total |
|-----------------------------|--------|--------|--------|---------|-----------|----------|--------|----------|-------|
| "DATE" NIGHT | 3 | ✓ | | | | | | | 2 / 3 |
| TAKE KID ON A "DATE" | 1 | x | | | | | | | 2 / 1 |
| ANALYZE 3 RE DEALS | 3 | ✓ | | | | | | | 1 / 3 |
| Gym | 4 | x | | | | | | | 2 / 4 |
| READ NONFICTION CHAPTER | 6 | ✓ | | | | | | | 4 / 6 |
| Work ON "LEAD GEN" 30+ mins | 5 | x | | | | | | | 1 / 5 |
| STAY ON track WITH DIET | 6 | ✓ | | | | | | | 6 / 6 |
| YOGA CLASS | 3 | x | | | | | | | 2 / 3 |
| MEET WITH A RE INVESTOR | 2 | ✓ | | | | | | | 1 / 2 |

Weekly Target Score:

33

Weekly Score Ratio:

21/33

Weekly Score Percent:

64 %

Weekly Reflection **To be filled out at end of the week**

1 What worked well this week? Why?

2 What can you do to improve your score next week?

ACTION TRACKER

"You get the results of what you repeatedly do."

Week of to

Goal #1

Goal #2

Goal #3

| Habit / Process | Target | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Total |
|----------------------|--------|--------|--------|---------|-----------|----------|--------|----------|-------|
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Weekly Target Score:

Weekly Score Ratio:

Weekly Score Percent:

Weekly Reflection To be filled out at end of the week

1 What worked well this week? Why?

2 What can you do to improve your score next week?

ACTION TRACKER

"You get the results of what you repeatedly do."

Week of to

Goal #1

Goal #2

Goal #3

| Habit / Process | Target | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Total |
|----------------------|--------|--------|--------|---------|-----------|----------|--------|----------|-------|
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