



Your Prosperity Pillars Worksheet

Use this worksheet to reflect on each pillar and outline actions that align your wealth with purpose.



Vision (Your Why + Joy)



Every great plan starts with meaning. Define your why, map your values, and set joy markers that guide every decision.

Reflection Prompts

- What does a truly fulfilled life look like for you and how does money support that vision?
- Which experiences or values matter most to you when you imagine your ideal future?
- If financial freedom gave you one extra hour every day, how would you spend it?

Expected Outcomes

- Vision Map
- Joy Budget
- Decision Filters



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Wellness (Mindset + Self-Care)



Money is emotional. Your beliefs and habits shape outcomes. Build calm confidence through mindset work and healthy financial behaviors.

Reflection Prompts

- What beliefs about money have shaped your decisions and do they still serve you?
- How does your current financial life impact your sense of peace and well-being?
- What habits or boundaries would help you feel more confident and less stressed about money?

Expected Outcomes

- Money Wellness Toolkit
- Stress Reduction Strategies
- Healthy Boundaries



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Prosperity Plan (Money Structures)



Structure creates freedom. Design advanced strategies for cash flow, investments, tax efficiency, retirement readiness, and estate planning.

Reflection Prompts

- What does financial security look like for you in 5, 10, and 20 years?
- Are you maximizing tax efficiency in your current plan?
- How do you want your investments to reflect your values ? (e.g ESG, ethical investing)

Expected Outcomes

- Written Prosperity Plan
- Investment Strategy
- Estate Considerations



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Impact (Relationships + Legacy)



Prosperity includes the people and causes you love. Design stewardship strategies that last for generations.

Reflection Prompts

- What values do you want to pass on to your family and how can your wealth reflect those values?
- Which people, causes, or communities matter most to you when you think about leaving a legacy?
- If you could make one lasting impact beyond your lifetime, what would it be?

Expected Outcomes

- Impact Brief
- Legacy Letters
- Giving Plan



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