



Prosperity Pillars Worksheet

Use this worksheet to reflect on your financial journey across the four pillars: Vision, Wellness, Prosperity Plan, and Impact. Answer the questions and bring clarity to your goals.

Vision (Your Why + Joy)

- 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?

Wellness (Mindset + Self-Care)

- 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?

Prosperity Plan (Money Structures)

- What does financial security look like for you in 5, 10, and 20 years?
- Do you have a clear picture of your current cash flow—income, expenses, and savings?
- Are you maximizing tax efficiency and planning for retirement?

Impact (Relationships + Legacy)

- 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?

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