



Charley VegyDise

Unleash Your Potential

CharleyVegyDise.com

850-792-1158

owner@vegdydise.com

Invest in Yourself: Life Assessment & Action Plan:

“Investing in yourself starts with self-awareness. This worksheet will guide you through assessing different areas of your life to identify where you need growth, nurturing, or change. Once you’ve completed the assessment, use the results to create a personalized plan to prioritize your self-investment.”

Instructions:

1. Rate each area of your life on a scale of 1 to 10 (1 = needs the most improvement, 10 = thriving).
2. Reflect on the follow-up questions for each section.
3. Write down one or two actionable steps for improvement in each area that needs attention.

Assessment Areas

1. Personal Development

- **Rating (1-10):** ____
- What new skills or hobbies have you been wanting to explore?
- Do you take time to set and review personal goals regularly?
- How often do you prioritize activities that help you grow mentally, emotionally, or spiritually?

Actionable Steps:

1. _____
2. _____

2. Physical Health

- **Rating (1-10):** ____
- Are you happy with your current energy levels and physical fitness?
- How often do you exercise or engage in physical activities?
- Are you nourishing your body with healthy foods and enough rest?

Actionable Steps:

1. _____
2. _____

3. Mental and Emotional Well-being

- **Rating (1-10):** ____
- Do you feel emotionally supported and resilient in your daily life?
- Are you taking time for self-care and mindfulness practices?
- Have you considered seeking professional help, like therapy or counseling, if needed?

Actionable Steps:

1. _____
2. _____

4. Career and Professional Growth

- **Rating (1-10):** ____
- Are you satisfied with your current job or business?
- Do you feel challenged and motivated in your work?
- Are there opportunities for you to learn or advance in your career?

Actionable Steps:

1. _____
2. _____

5. Financial Health

- **Rating (1-10):** ____
- Do you have a budget and a savings plan in place?
- Are you actively working towards financial goals like paying off debt or building wealth?
- How confident do you feel about managing your money effectively?

Actionable Steps:

1. _____
2. _____

6. Relationships

- **Rating (1-10):** ____
- Do you feel supported and valued by your family, friends, or partner?
- Are there relationships in your life that feel draining or toxic?
- How often do you nurture and invest in your connections with others?

Actionable Steps:

1. _____

2. _____

7. Time and Stress Management

- **Rating (1-10):** _____
- Do you feel like you have enough time for the things that matter most?
- Are you managing your responsibilities in a way that reduces stress?
- How often do you set boundaries to protect your time and energy?

Actionable Steps:

1. _____

2. _____

Reflection Questions:

1. Which area of your life needs the most attention right now?
2. What is one small change you can make this week to start improving in that area?
3. How will investing in yourself positively impact other areas of your life?

Bonus Section:

Your Personalized Investment Plan

Write down your top three priorities for self-investment and the first step you'll take for each:

1. Priority: _____

First Step: _____

2. Priority: _____

First Step: _____

3. Priority: _____

First Step: _____