



# LIFE PLANNING PROGRAM

Strategic Planning for Your Life and Family

Many entrepreneurs spend significant time planning and tracking KPIs for their businesses, but rarely apply the same discipline to their personal lives and families. We create mission statements, set strategic goals, and measure progress in our companies—yet our most important asset, our life and the people we love, often runs on autopilot.

The Fuel 5 Life Planning Program changes that.

This workbook will guide you through a comprehensive planning process across the five critical areas of life: Family, Friends, Fitness, Finance, and Faith. Just as you wouldn't run your business without a strategic plan, you shouldn't navigate life without one either.

Take your time with this process. Be honest with yourself. This isn't about perfection—it's about clarity, intentionality, and creating a roadmap for the life you truly want to live.

This workbook pairs with your Fuel 5 Daily Habit Tracker, creating a complete system: strategic planning at the top, daily execution at the bottom. Together, they'll help you bridge the gap between where you are today and where you want to be.

**How to Use This Workbook:**

- Set aside 2-3 hours of uninterrupted time to complete this workbook
- Be specific in your responses—vague goals create vague results
- Involve your spouse or family members where appropriate
- Review this document weekly to stay on track
- Update your plan quarterly as circumstances change

## Your Family Mission Statement

A family mission statement defines who you are, what you stand for, and the legacy you want to create together. It serves as your family's North Star—a guiding principle for decisions, behaviors, and priorities.

### Creating Your Mission Statement:

- Keep it concise (1-3 sentences)
- Make it memorable and meaningful to your family
- Focus on values, purpose, and impact
- Consider involving family members in the creation process
- Write in present tense as if you're already living it

### Examples:

*"The Johnson family creates adventure, serves our community, and supports each other's dreams. We choose gratitude over complaint, courage over comfort, and togetherness over distraction."*

*"We are a family that builds each other up, celebrates wins together, and never stops learning. We prioritize experiences over things and leave every place better than we found it."*

### Your Family Mission Statement:

## Core Values Exploration

Review the values below and circle or check the ones that resonate most with you and your family. These represent what matters most in how you live, make decisions, and interact with the world.

- Don't overthink this—trust your gut. Circle 10-15 values that jump out at you, then you'll narrow them down to your top 4-6 on the next page.

### Personal Growth

- Continuous Learning
- Curiosity
- Growth Mindset
- Self-Improvement
- Resilience
- Discipline
- Grit
- Perseverance

### Personal Growth

- Love
- Loyalty
- Trust
- Authenticity
- Communication
- Compassion
- Empathy
- Kindness
- Respect
- Support

### Character

- Integrity
- Honesty
- Accountability
- Responsibility
- Humility
- Courage
- Patience
- Self-Control

### Action & Impact

- Service
- Generosity
- Contribution
- Leadership
- Initiative
- Excellence
- Achievement
- Impact
- Legacy

## Core Values Exploration (continued)

### Joy & Experience

- Adventure
- Fun
- Playfulness
- Celebration
- Gratitude
- Joy
- Humor
- Spontaneity

### Mindset & Perspective

- Optimism
- Open-Mindedness
- Flexibility
- Balance
- Wisdom
- Mindfulness
- Peace
- Simplicity

### Innovation & Creativity

- Creativity
- Innovation
- Vision
- Risk-Taking
- Boldness
- Entrepreneurship

### Health & Vitality

- Health
- Vitality
- Energy
- Wellness
- Strength

### Connection & Community

- Community
- Community
- Belonging
- Teamwork
- Collaboration
- Unity
- Inclusion

### Freedom & Independence

- Freedom
- Independence
- Autonomy
- Choice

### Stability & Security

- Security
- Stability
- Consistency
- Reliability
- Order

### Spiritual & Purpose

- Faith
- Purpose
- Spirituality
- Meaning
- Connection to Higher Power

## Your Family's Core Values

From the values you circled, select your top 4-6 that will guide your family's decisions and behaviors. You can combine related values (e.g., "Grit: Our family demonstrates resilience and perseverance in pursuing our goals").

**Remember:** Core values should be specific enough to be meaningful but broad enough to apply across many situations. Describe what each value means to YOUR family in the right column.

### Core Value

### What This Means to Our Family

Core Value	What This Means to Our Family

## Fuel 5 Self-Assessment

Rate yourself honestly in each area on a scale of 1-10, where:

**10 = Everything is excellent.** You're thriving in this area and couldn't imagine it much better.

**5 = It's okay, but there's significant room for improvement.** You're functioning but not fulfilled.

**1 = This area needs urgent attention.** You're unhappy and facing challenges.

**Important:** Avoid defaulting to 7s just because they feel "safe." Be honest about where you truly are. Also set a realistic 12-month goal—you don't have to jump from a 3 to a 10, but you should see meaningful progress.

Area	Today's Score (1-10)	What My Current Score Means & What My 12-Month Goal Would Mean	12- Month Goal (1-10)
 <b>FAMILY:</b>			
 <b>FRIENDS:</b>			
 <b>FITNESS:</b>			
 <b>FINANCES (Business):</b>			
 <b>FAITH:</b>			



## **Family: Your Desired Future**

**Family** encompasses your relationships with your spouse, children, parents, siblings, and extended family. This is about the quality of time spent together, the depth of your connections, and the intentionality of your family culture.

### **10-Year Vision: Describe Your Ideal Family Life**

What does your family look like in 10 years? Where do you live? What traditions do you have? How do you spend time together? What is the quality of your relationships? Be specific and paint the picture.

### **Your Motivation: WHY This Matters**

Why is achieving this vision important to you? What will it mean for you and your family? What are you afraid of missing if you don't make this a priority?



## Family: Your Action Plan

### 5 - Year Milestone

What needs to be true about your family in 5 years to be on track for your 10-year vision?

### 3 - Year Milestone

What specific progress must you make in 3 years?

### 1 - Year Milestone

What will you accomplish in the next 12 months?



## **Family: Your Action Plan (continued)**

### **Habits & Behaviors to Implement**

What daily, weekly, or monthly habits must you adopt to make your desired future realistic? Be specific about frequency and commitment.



## **Friends: Your Desired Future**

**Friends** represents your social connections beyond family—the people who energize you, challenge you, and support you. This includes both depth of existing friendships and intentionality about building new ones.

### **10-Year Vision: Describe Your Ideal Social Life**

Who are the people in your life? How often do you connect? What do you do together? What kind of friend are YOU? How do your friendships add to your life?

### **Your Motivation: WHY This Matters**

Why is having strong friendships important to you? What do you gain from these relationships? What are you afraid of missing if you don't invest here?



## **Friends: Your Action Plan**

### **5 - Year Milestone**

What needs to be true about your friendships in 5 years to be on track for your 10 year vision?

### **3 - Year Milestone**

What specific progress must you make in 3 years?

### **1 - Year Milestone**

What will you accomplish in the next 12 months?



## **Friends: Your Action Plan (continued)**

### **Habits & Behaviors to Implement**

What daily, weekly, or monthly habits must you adopt to make your desired future realistic? Be specific about frequency and commitment.

## **Fitness: Your Desired Future**

**Fitness** includes both physical and mental health—your body’s strength and conditioning, your energy levels, your mental clarity, and your emotional resilience. This is about optimizing your most important asset: YOU.

### **10-Year Vision: Describe Your Ideal Health & Fitness**

How do you look and feel? What are you physically capable of doing? How's your energy throughout the day? How do you handle stress? What does your mental health look like?

### **Your Motivation: WHY This Matters**

Why is your health and fitness important to you? What do you gain from being in great shape? What are you afraid of if you don't prioritize this?

 **Fitness: Your Action Plan**

**5 - Year Milestone**

What needs to be true about your fitness in 5 years to be on track for your 10 year vision?

**3 - Year Milestone**

What specific progress must you make in 3 years?

**1 - Year Milestone**

What will you accomplish in the next 12 months?

## **Fitness: Your Action Plan (continued)**

### **Habits & Behaviors to Implement**

What daily, weekly, or monthly habits must you adopt to make your desired future realistic? Be specific about frequency and commitment.

 **Finance: Your Desired Future**

**Finance** encompasses your business success, personal wealth, financial security, and the freedom money provides. This includes income, assets, cash flow, and the lifestyle your finances enable.

**10-Year Vision: Describe Your Ideal Health & Fitness**

What does your business look like? What's your net worth? What's your annual income? How much freedom do you have? What does money allow you to do for yourself and others?

**Your Motivation: WHY This Matters**

Why is financial success important to you? What will it enable? What impact do you want to make? What are you afraid of missing if you don't achieve this?



## Finance: Your Action Plan

### 5 - Year Milestone

What needs to be true about your finances in 5 years to be on track for your 10 year vision?

### 3 - Year Milestone

What specific progress must you make in 3 years?

### 1 - Year Milestone

What will you accomplish in the next 12 months?



## **Finance: Your Action Plan (continued)**

### **Habits & Behaviors to Implement**

What daily, weekly, or monthly habits must you adopt to make your desired future realistic? Be specific about frequency and commitment.



## **Faith: Your Desired Future**

**Faith** represents your spiritual life and connection to something greater than yourself—whether that's organized religion, a higher power, the universe, or a sense of purpose and meaning. This is about your inner life and what grounds you.

### **10-Year Vision: Describe Your Ideal Health & Fitness**

What role does faith/spirituality play in your life? How do you practice or connect? What peace or purpose does it provide? How does it influence your decisions and relationships?

### **Your Motivation: WHY This Matters**

Why is your spiritual life important to you? What do you gain from this connection? What are you afraid of missing if you don't nurture this area?



## Faith: Your Action Plan

### 5 - Year Milestone

What needs to be true about your faith/spirituality in 5 years to be on track for your 10 year vision?

### 3 - Year Milestone

What specific progress must you make in 3 years?

### 1 - Year Milestone

What will you accomplish in the next 12 months?



## **Finance: Your Action Plan (continued)**

### **Habits & Behaviors to Implement**

What daily, weekly, or monthly habits must you adopt to make your desired future realistic? Be specific about frequency and commitment.

## Your Next Steps

Congratulations on completing your Fuel 5 Life Planning Program! You've done the hard work of getting clarity on where you are, where you want to be, and what it will take to get there.

But here's the truth: **this document means nothing if it sits in a drawer.**

### To make this plan come to life:

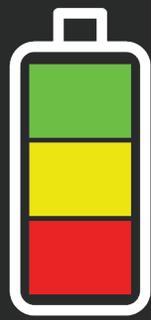
- **Use your Fuel 5 Daily Habit Tracker** to work on the specific habits you identified in each area. Track your progress daily and score yourself honestly.
- **Review this workbook weekly.** Block 15-30 minutes every week to revisit your goals and ensure you're on track. Sunday evenings or Monday mornings work well for most people.
- **Update your plan quarterly.** Life changes, priorities shift, and circumstances evolve. Revisit this every 90 days and make adjustments as needed.
- **Share it with someone.** Accountability accelerates progress. Share your goals with your spouse, a close friend, or a coach who will check in on your progress.
- **Celebrate progress.** When you hit milestones, acknowledge them. Progress compounds when you recognize and reward yourself for the work you're doing.

**Remember:** You built a business by being intentional, strategic, and consistent. Your life deserves the same level of focus. The Fuel 5 framework gives you the structure, now it's up to you to do the work.

*You've got this. Now go make it happen.*

## **Additional Notes & Reflections**

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