

Life Stewardship For Couples* 2014

***Please complete one copy for each spouse.**

Faith

1. Am I satisfied with the frequency and the ways in which I attend church/synagogue?
2. Am I satisfied with the frequency and the ways in which I serve my church/synagogue?
3. Do my family worship practices meet my goals?
4. Am I satisfied with the manner in which I have passed on my spiritual values to my children/heirs?
5. Are there areas of my life which I want to bring into more conformity with my spiritual values and convictions?

Finances

1. Do I feel I have done an adequate job of budgeting in the past year?
2. Do I feel financial pressure on a month-to-month basis?
3. What are my three major financial goals for the next five years?
4. What are my three major financial objectives for 2014?
5. Am I satisfied with my will and trust arrangements?
6. Am I satisfied with my tax preparation and advice?
7. Am I satisfied with my income tax liability?
 - A. Too high
 - B. Too low

Finances

1. Notes, observations, ideas:

2. Possible objectives and goals:

3. Primary objectives and goals:

A.

B.

C.

Family

1. What family member(s) have I wanted to see during the last year but have not been able to find the time?

2. What family events are:
 - A. Most rewarding:

 - B. Most Fun:

3. What family members do I enjoy seeing:
 - A. Most:

 - B. Least:

4. What family member(s) is/are in need of special attention during the next year?

5. For each of my children, parents or spouse, what special event is most important to them during the next year?

6. What would be the greatest gift/reward I could give to my family?

7. With my spouse, what are our three most important objectives/goals for 2014?

8. What kinds of new activities (e.g., sports, social) can family members do together?

9. What activities do my children, parents or spouse enjoy most?

10. Would I like to take a family vacation in 2014? If so, where?

Family

1. Notes, observations, ideas:

2. Possible objectives and goals:

3. Primary objectives and goals:

A.

B.

C.

Fitness

1. Mental
 - A. Do I feel like I am continuing to learn and to be challenged?

 - B. What areas of life or hobbies have I wanted to learn about but did not find the time?

 - C. For my work/career development, what training or classes should I attend in 2014?

 - D. How many books did I read in 2013? Am I satisfied with the results? Should I plan to read more books in 2014? If so, what kinds?

 - E. What are three major steps I am going to take in 2014 to move toward my ideal mental development?

2. Physical

- A. What is my ideal body weight?

- B. When was my last complete physical?

- C. Should I have a complete physical in 2014?

- D. What activities make me feel most invigorated?

- E. What are my three primary physical goals for 2014?

- F. What are the three major steps I am going to take in 2014 to move toward my ideal physical fitness?

Fitness

1. Notes, observations, ideas:

2. Possible objectives and goals:

3. Primary objectives and goals:
 - A.

 - B.

 - C.

Friends/Community

1. Who among my friends is in need of help at this time?
2. Which of my friends do I enjoy spending time with the most?
3. What individuals (couples) in my community have I wanted to spend time with, but haven't found the time?
4. Whom do I want to meet in our community during the next year?
5. What social or civic organizations are important enough for me to spend time with during the next year?
6. What kinds of new activities (e.g., sports, social) can I do with my friends?

Facilities

1. Home
 - A. What do I enjoy most about my current home?

 - B. What changes would I make to my home?

 - C. What items would I like to purchase in 2014 for my home (furniture, equipment, remodeling, etc.)?

2. Office
 - A. What do I enjoy most about my current office?

 - B. What changes would I make to my office?

 - C. What items would I like to purchase in 2014 for my office (furniture, equipment, remodeling, etc.)?

Additional Notes, Observations, Ideas: