MISSION WEALTH

True Wealth Priorities

Identify what feels most important in your current season of life.

True wealth extends beyond finances. This exercise is designed to help clarify the priorities and experiences that matter most to you right now.

1 Select Your Top Priorities

Select the top 5 priorities from any category below that you connect with in this very moment. Feel free to add priorities that are not included in this list.



Relationships

- ☐ Family
- ☐ Love
- ☐ Community
- ☐ Connection



Growth & Purpose

- ☐ Education
- ☐ Knowledge
- ☐ Meaning
- ☐ Passion



Lifestyle & Experiences

- ☐ Adventure
- ☐ Freedom
- ☐ Fun
- ☐ Nature



Well-being

- ☐ Health
- ☐ Balance
- ☐ Peace
- ☐ Comfort



Character & Values

- ☐ Integrity
- ☐ Kindness
- ☐ Courage
- ☐ Respect



Contribution

- ☐ Spirituality/Faith
- ☐ Humor
- ☐ Impact
- ☐ Work Ethic



Financial

- ☐ Wealth
- ☐ Financial Security
- ☐ Stability
- ☐ Success



Other (Your Priorities)

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

2 My Top Three Priorities

Among the priorities you identified, list your top 3 priorities below.

1	2	3
_____	_____	_____

3 Reflections

Where do you feel the largest gap exists between you and your True Wealth priorities?

_____

_____

_____

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