

Statement of Financial Purpose



DEFINE YOUR STATEMENT OF FINANCIAL PURPOSE AS TO ALIGN THE WAY YOU SPEND YOUR TIME, MONEY, AND ENERGY IN A WAY THAT FEELS MORE SATISFYING.

WHY IS MONEY IMPORTANT TO ME?

Circle 1-3 important words in your answer above and re-write them below.

IF _____, _____, _____ WERE ALREADY PRESENT, WHAT ELSE IS POSSIBLE IN MY LIFE?

Circle 1-3 important words in your answer above and re-write them below.

WHAT ABOUT _____, _____, AND _____ IS IMPORTANT TO ME?



CLOSE YOUR EYES AND GET A PICTURE

Follow the prompts and ask yourself "who am I being" (words like: connection, trust, joy, brilliance, content curious, decisive, etc.) Write the answer in the box. Then ask yourself, in this picture what do I taste, see, touch, smell, hear – whether that's people, events, times of day, etc.

MOMENTS WHEN...	WHO AM I BEING?	WHAT DO I TASTE, SEE, TOUCH, SMELL, HEAR?
When I'm most at rest or content		
When I laugh the most		
When I feel the most connected		
When I feel most invigorated		
When I feel excited		
When I feel satisfied		

CRAFT A STATEMENT IN 10 WORDS OR LESS. Reflect on the words you've written above and summarize in a brief statement.

Here are a few examples of what a Statement of Financial Purpose might look like:

- + Creative, impactful endeavors that draw people together
- + Activity to seek my personal best: physically, mentally, spiritually
- + Time together as a family in nature
- + Music and laughter in my community + Relaxation with family by water

APPLY IT TO YOUR MONEY:

Now that you've crafted a Statement of Financial Purpose, what are some ideas of ways you want to use your money, time, and energy?

