

P.A.S.S.: Personal Action Strategy Session

This is a comprehensive process and series to jump start or adjust course along the way.

Following are the key ingredients of the recipe; how much time, energy, and focus are a function of where you are at and whether you are tackling this yourself or with some guidance:

- Define success
- Pitfalls of traditional retirement
- Advancement; who needs retirement
- Your life purpose; a personal vision statement
- Roadblocks to happiness
- Resources to guide you.
- Current state: evaluate on scale from 1 – 10(highest) whether the following are assets or liabilities, contribute to your well-being or detract, and tally net impact today.
- Family, friends, work, hobbies, faith, health, financial, other.
- Future state: Do the same for what you would like it to be and tally.
- Assess gap, put in place a plan to improve your personal assessment net worth and let's review quarterly. Do an annual comprehensive assessment factoring in changes in life, status and attitudes.