

PERSONAL HEALTH, WELLNESS, and BALANCE

V.2.1

Additional guidance on back page.

The pandemic disrupted life in many ways, which means we must pay attention to what's important to ourselves and our families. The basics of everyday life (our health, wellness, and balance) are good places to focus our attention. Use of this tool will provide a 'life basics' snapshot of where there may be gaps or things to review with your coach. There are no wrong responses. We are all works in progress.

Instructions

Read each statement and check it if it's true for you. Keep in mind some statements may never be true or attainable. When so, check them off. **This tool is to be used for reflection, not for grading yourself.**

THE INNER SELF (Personal)

MIND

- I read or write, paint, play or listen to music, or perform a daily activity that engages the creative side of my mind.
- My home is neat and clean (clean floors and windows, organized closets, no clutter).
- I live proactively, not reactively; I recognize it's better to respond than to react to things.
- I keep my mind engaged by proactively learning new things formally or informally.
- I disengage from busy-ness of life and devote at least 20 minutes each day for quiet time (away from people and distractions).

— **Number marked**

BODY

- I respect my body and honor it by taking great care of myself.
- I eat foods that are healthy and low in sugar, carbohydrates, and fats.
- I have physical, dental, and eye exams at least every 12 to 18 months.
- I walk or exercise at least 3 times each week.
- I make sure to get at least 6 to 8 hours of sleep each night.

— **Number marked**

SPIRIT

- I actively seek out people I appreciate and look forward to seeing each day.
- I recognize and celebrate when good things (big or small) happen for me and for others.
- I surround myself with music, art, and hobbies that make my life more enjoyable.
- I consistently make time and seek opportunities to re-energize myself each day.
- I recognize time is short and try to live my life with purpose each day.

— **Number marked**

THE OUTER SELF (Public)

FAMILY / COMMUNITY

- I feel valued, respected, and cared for by my family, friends, and community.
- I deliberately maintain personal and professional relationships that energize and inspire me.
- I regularly tell my partner, parents, children, siblings, and friends that I love them.
- I have a circle of family and friends who love and appreciate me for who I am.
- I participate in activities and support programs that improve my community and the people who live in it.

— **Number marked**

FINANCIAL

- I manage my money: I save and invest at least 10% of what I earn, pay my bills on time, have short-term savings for unexpected expenses, and spend wisely.
- My major assets (autos, home, and possessions) are well-maintained and properly insured.
- I consciously live well, and within my means.
- My personal files, papers and receipts are scanned, organized, and stored electronically.
- I have a financial plan I follow to ensure a stable financial future.
- **Number marked**

INTERDEPENDENCE

- I am respectful towards others in all ways; I honor personal boundaries and personal preferences.
- I am trustworthy; people know they can depend on me to do the right thing and what I promise.
- I am fully interdependent—I work as well with others as I do by myself.
- I strive to live my life being consistent in thought, word, and action.
- I enforce strong boundaries, especially with those who are toxic or I’m not comfortable with.
- **Number marked**

Additional Guidance:

Nowadays, life may feel even more stressful than usual. There are no magic formulas to help us achieve and maintain a life that’s healthy and balanced. But there are simple steps we can take to be better positioned to handle “life’s pressures and surprises.” Consider this self-assessment a recalibration tool.

This assessment focuses on six important aspects of our lives. Yes, there are others, but these tend to be the universal themes people generally seek coaching support with.

Share the results with your coach or your trusted advisor. Oftentimes, strategies, responses, or solutions emerge from simple conversations. Visit www.AssessmentCorps.com for additional tools.

Scoring - Personal Health, Wellness, and Balance

1 Total the categories. Add up the checked items in each category and, starting at the bottom, block out your numbered score in the appropriate category columns. This is your handmade bar chart.

2 Revisit the assessment at regular intervals. The goal is to work towards completing all the boxes. This process may take time; it is not a test of speed but an endeavor towards completeness.

OVERALL SCORE

Categories >	Mind	Body	Spirit	Family / Community	Financial	Inter-dependent Person
5						
4						
3						
2						
1						

Scores: ^ ^ ^ ^ ^ ^