

# Life Assessment 2023 [www.livinthedreamlifecoaching.org](http://www.livinthedreamlifecoaching.org)

What is Coaching?

*Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.*

**The purpose of this wholistic assessment is for you to understand where you are currently and to ponder where you'd like to be in the future. My role as your coach is to ask you powerful questions to unlock your expertise about yourself in order to move you forward towards your preferred future. Feel free to skip any section that seems irrelevant to you right now. Each scale starts with a 1 which is lowest, 10 as highest or peak performance. As a flexible document, make this your own. Add questions or insights not included in this tool so to make it most useful to you.**

## **Family- How are the relationships with my key family members?**

On a scale of 1-10 (weak- good- strong) + what could be improved?

Name

Name

Name

Name

Name

## **Fitness- How is my overall physical well-being?**

1. Do I feel strong? (1-10)
2. Do I have high energy? (1-10)
3. Is my body flexible and do I feel relaxed (or tight)? (1-10)
4. Do I have good endurance? (1-10)
5. How is my bloodwork? (1-10)      What needs to be addressed?
6. Am I slow or quick? (1-10)
7. Am I walking 10,000 steps a day? (1-10); How many walk breaks do I take?
8. If I could change anything right now about my fitness, what would that be?

## **Focus- How is your mental health and ability to learn?**

1. Would you describe yourself as mentally sharp? (1-10)
2. Can you get your work and tasks done promptly due to laser focus? (1-10)
3. Are you efficient or slow and scattered?
4. Are you learning something new regularly (work challenges, research & study)?
5. Are you reading books/magazines/articles to learn new things?

**Feelings- How well do you read other people's feelings and communicate your own emotions constructively? (note Personality Tests to discover how God wired you)**

1. Are you good at reading people's facial expressions & tone of voice? (1-10)
2. Are you self-controlled, slow to speak, quick to listen? (1-10)
3. Tool: [https://greatergood.berkeley.edu/quizzes/ei\\_quiz/take\\_quiz](https://greatergood.berkeley.edu/quizzes/ei_quiz/take_quiz) for EQ
4. Tool: <https://www.psychologytoday.com/us/tests/personality/emotional-intelligence-test> (another option with summary or full evaluation)
5. Enneagram is a tool to understand how you are wired <https://test2.thepersonalitylab.org/> (very helpful to me in addressing extremes)
6. Myers- Briggs Personality Test <https://my-personality-test.com/personality-type-indicator>
7. Love Languages <https://5lovelanguages.com/quizzes/love-language>

**Food- Do I live to eat or eat to live? Is what I am eating good for my health?**

1. Do I drink 6-8 glasses of water a day? (1-10)
2. Do I eat the right portions of food? (1-10)
3. Are my sources for sugar limited? (no soda, pastries, cookies, etc.) (1-10)
4. Am I eating 5+ fruits & vegetables a day? (1-10)
5. Do I limit my intake of red meats and processed meats (sausage, pepperoni...)?
6. If I drink alcohol, is my intake of 2 drinks or less a day?
7. Is my cholesterol ratio good? If not...
8. If I could change anything right now about my food intake, what would that be?

**Friends- Do I have 1-3 friends I do life deeply together with?**

1. If I'm wrestling with a major issue in life, who would I likely turn to?
2. If I wanted to do my favorite source of recreation/play/activity, who would I call?
3. Who knows what is really going on in my heart & soul & life?
4. If I could change my Friendship Quotient, what would that look like ideally?

**Finances- Are my finances in order? (1-10)**

1. Do I have debt? Is it good debt? Is it necessary debt or could it be eliminated?
2. Do I have a budget and consult it regularly to know I am living within my means?
3. Am I nearing "retirement" or "refirement"? Do I have an "encore" work for the second half?
  - a. What's my longevity factor? <https://media.nmfn.com/tnetwork/lifespan/index.html#1>

- b. How much do I need to live on? vanguard - Retirement Nest Egg calculator  
<https://retirementplans.vanguard.com/VGApp/pe/pubeducation/calculators/RetirementNestEggCalc.jsf>
  - c. Compound Interest Calculator <https://www.investor.gov/financial-tools-calculators/calculators/compound-interest-calculator>
  - d. Retirement Withdrawal Calculator <https://www.mycalculators.com/ca/retcalc1m.html>
  - e. Many calculators <https://www.caniretireyet.com/the-best-retirement-calculators/>
  - f. Vanguard Dynamic Spending Calculator <https://ficalc.app/>
  - g. What is my vision for the second half of life following decades of full-time work?
4. Am I content with what I make, what I have to live on, what I have saved, and prepared with resources to live on towards my potential life expectancy? (1-10)
  5. If I could change anything with my finances, what would that be?
  6. Will I/we “Live on less so I/we can bless”?

#### **Faith- How is my relationship with God (1-10)**

1. Do I meet regularly with God in solitude for prayer conversation? (1-10)
2. Do I devote time to reading & reflecting on the scriptures? (1-10)
3. Do I worship God attentively with singing in my car, at home or at church? (1-10)
4. How do I serve the Lord with the spiritual gifts, talents & resources God has given me?
5. When I pass someday, will it be clear that I loved God and loved people? (1-10)
6. What do I need to grow in my faith journey?
7. Do I have a small group of Christians that I do life together with “to spur me on towards love and good deeds”?

#### **Fun- Am I *livin' the dream*?**

1. Would people describe you as “joyful”? (1-10)
2. Do you look forward to most days of the week? (1-10)
3. Are you enthusiastic about what is going on in your life? (1-10)
4. Would people describe you as living life to the fullest? (1-10)
5. What possibilities/activities would make life more FUN/fulfilling for you?
6. What fun/exhilarating/positive adventures/excursions do you have lined up this year?
7. Are you maximizing your potential in these areas while positively impacting others?

**Future- Do I have a “decades plan” defining my purpose for each decade & describe how I will live that out?**

1. 50's=
2. 60's=
3. 70's=
4. 80's=
5. 90's=

**What is the legacy (core values, wisdom, resources, blessings), from generation to generation, that I want to pass on to my children, children's children, and their children?**

**In 1 sentence: What is my Personal Mission Statement?**

Based on the Assessment above, what are my most pressing/important areas I'd like to address?

- 1.
  - 2.
  - 3.
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### **Reflection on Your Life**

1. Describe some high points in your life (events, seasons, years) in detail:
  
  
  
  
  
  
  
  
  
  
2. Describe some low points in your ministry (events, seasons, years) in detail:

3. What are your greatest passions in in life (what do you enjoy most and get energy from?):
  
4. What sucks the energy out of you? (tasks, situations, activities)
  
5. What do you need to help you THRIVE as a child of God? (kinds of support, resources, abilities, skills, continuing education, friendships, leadership, etc.):
  
6. If you could wave a magic wand and turn your life into your dream situation, what would it look like and what would you do or not do that you are doing or not doing now?
  
7. If I were to coach you long-term, what would you like to strengthen or grow in, based on the above assessment?
  
8. If you are grieving the loss of anything, would you be open to having Pastor Tom meet with you online via zoom, in person, or by phone? (262-490-2057, [pietztom1@gmail.com](mailto:pietztom1@gmail.com) , [www.livinthedreamlifecoaching.org](http://www.livinthedreamlifecoaching.org) )