

2024 annual life planning

Our Coaching Initiative

2024

Welcome to the most intentional year of your life!

Over the next few months, you have the incredible opportunity to intentionally shape your future self by setting your 2024 self up for success.

This workbook is your guide to self-discovery. By reviewing what you were able to accomplish this year, identifying what you learned from your setbacks, envisioning your future self, and setting aligned goals, you will gain clarity on who you are and who you want to become.

The path ahead will have its challenges.

There will be highs and lows, progress and setbacks.

What matters most is that you show up fully by bringing your whole heart to this experience. Immerse yourself in self-reflection, take bold inspired action, and nurture any seeds of change that emerge.

I believe in the power you hold within. You have everything you need to create a life of meaning, joy, and purpose.

Trust the process. Trust yourself. And know that you are not alone on this journey.

A handwritten signature in white ink that reads "Lindsay Troxell". The signature is written in a cursive, flowing style.

Head Coach
The Coaching Collective

2023 REFLECTION

What goals did I achieve?

What am I the most proud of?

What didn't go as planned?

What did I learn? How did I grow?

START STOP CONTINUE...

What do I want to START doing that I wasn't doing in 2023?

What do I want to STOP doing in 2024 that didn't serve me in 2023?

What do I want to CONTINUE doing in 2024 that worked for me in 2023?

VALUES

Values allow us to show up as our best selves, avoid burnout, set boundaries, develop habits, and live a more aligned and intentional life. They help us determine where to spend our time, money, and energy. Select your 3-5 primary values and use the following pages to identify how you define those values and the behaviors that align with them. Feel free to pick something not on the list.

Accountability	Efficiency	Integrity	Risk-taking
Achievement	Equality	Intuition	Safety
Adaptability	Ethics	Job security	Security
Adventure	Excellence	Joy	Self-discipline
Altruism	Fairness	Justice	Self-expression
Ambition	Faith	Kindness	Self-respect
Authenticity	Family	Knowledge	Serenity
Balance	Financial stability	Leadership	Service
Beauty	Forgiveness	Learning	Simplicity
Being the best	Freedom	Legacy	Spirituality
Belonging	Friendship	Leisure	Sportsmanship
Career	Fulfillment	Love	Stewardship
Caring	Fun	Loyalty	Success
Collaboration	Generosity	Nature	Teamwork
Commitment	Giving back	Openness	Thrift
Community	Grace	Optimism	Time
Compassion	Gratitude	Order	Tradition
Competence	Growth	Parenting	Travel
Confidence	Harmony	Patience	Trust
Connection	Health	Patriotism	Truth
Contentment	Home	Peace	Understanding
Contribution	Honesty	Perseverance	Uniqueness
Cooperation	Hope	Power	Usefulness
Courage	Humility	Pride	Vision
Creativity	Humor	Recognition	Vulnerability
Curiosity	Impact	Reliability	Wealth
Dignity	Inclusion	Resourcefulness	Well-being
Diversity	Independence	Respect	Wholeheartedness
Environment	Initiative	Responsibility	Wisdom

VALUES

What are my 3 - 5 core values that guide my actions and shape the way that I show up in the world?

VALUE #1 _____

How do I define this value?

What actions and activities reflect this value?

VALUE #2 _____

How do I define this value?

What actions and activities reflect this value?

VALUE #3 _____

How do I define this value?

What actions and activities reflect this value?

VALUE #4 _____

How do I define this value?

What actions and activities reflect this value?

VALUE #5 _____

How do I define this value?

What actions and activities reflect this value?

DIMENSIONS OF SELF

As humans we aren't one-dimensional we are multifaceted individuals that are shaped by our experiences, environment, learning, society, family, beliefs, and values... and we are constantly evolving. There is no right answer to what makes up a complete person, what you see below is simply an interpretation of 8 dimensions of self that when fully explored can provide a roadmap to living life by design rather than by default. If you find that a category doesn't feel fully aligned please feel free to replace it with something that does. Or recommendation is to use the descriptions of each category for the work on the following pages (Future Self & 1 Year Vision Board). If you are approaching retirement think about what you will do to find purpose and identity in retirement.

PHYSICAL: Nourishment | Hydration | Movement | Sleep | Self Care

RESILIENCE: Thoughts | Feelings | Actions | Nervous System | Breathing

MENTAL: Focus | Mindfulness | Learning | Time | Structure

BUSINESS/CAREER: Role | Identity | Purpose | Impact | Growth

MY ENVIRONMENT: Home | Space | Organization | Energy

JOY: Hobbies | Play | Release | Ways to "Let Go" | Spiritual

SOCIAL: Relationships | Family | Communication | Community | Society

FINANCIAL: Money Story | How You Make \$ | How You Spend \$

FUTURE-SELF ROADMAP

Being able to connect with your future self and visualize where you want to end up allows you to be more intentional with how you invest in yourself today. Put yourself 3, 10, 20 years into the future and ask yourself... What are the things that I want to be able to do at the following ages? What does my future self spend time, money, and energy on? What am I physically able to do? What brings me joy? Who am I spending time with? What have I accomplished?

1 YEAR VISION BOARD

Use this section as a goals worksheet. What do you want to achieve in 2024? If you were to get to the end of 2024 and you were reviewing everything that you had done, what are you most proud of? Think about what you must do throughout the year in order to be sure that these things happen. What would make this the most intentional and best year yet?

DAILY HABITS

In order to get to the end of the year and have achieved all of the goals that you have created for yourself, what daily habits must you engage in? Use this worksheet to identify the most important daily habits that will guarantee you get your desired results. These can be simple things like 2 minutes of daily breathwork, walking for 10 minutes after dinner to regulate your glucose, practicing gratitude, making your bed... or they can be bigger more involved habits like strength training 3x a week, reading for 30 minutes each day, spending 30 minutes learning a language 3x a week... it's entirely up to you what your habits are and how many you pick.

MAJOR MILESTONES

Map out your major milestones, goals, commitments, trips, key dates, etc. to ensure that you have a clear picture of what needs to happen throughout the year to maximize your energy and avoid overwhelm or burnout.

FUTURE-SELF ROADMAP

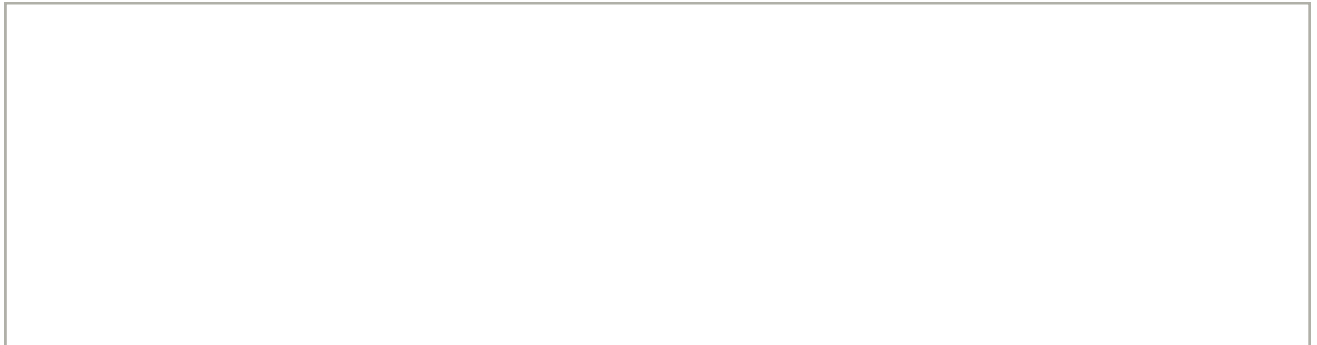
Age: _____ Date: _____ Yrs to Date: _____

Age: _____ Date: _____ Yrs to Date: _____

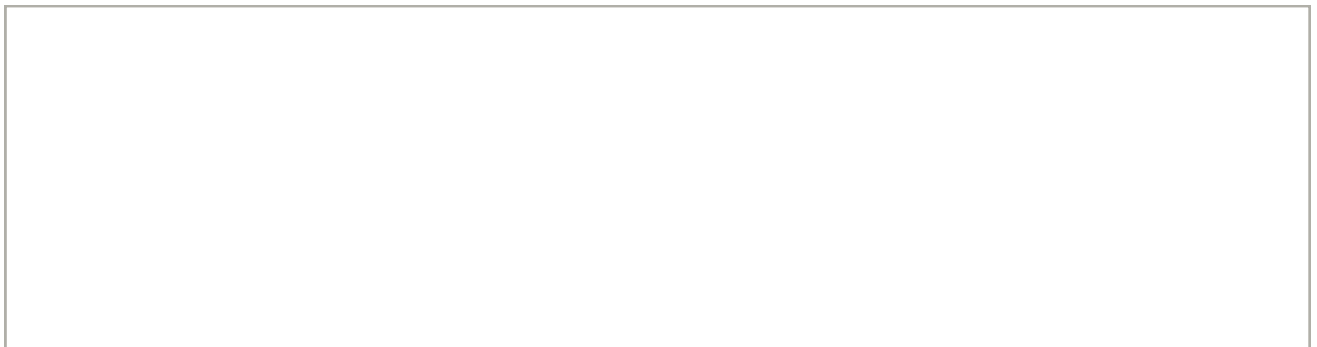
Age: _____ Date: _____ Yrs to Date: _____

1 YEAR VISION BOARD

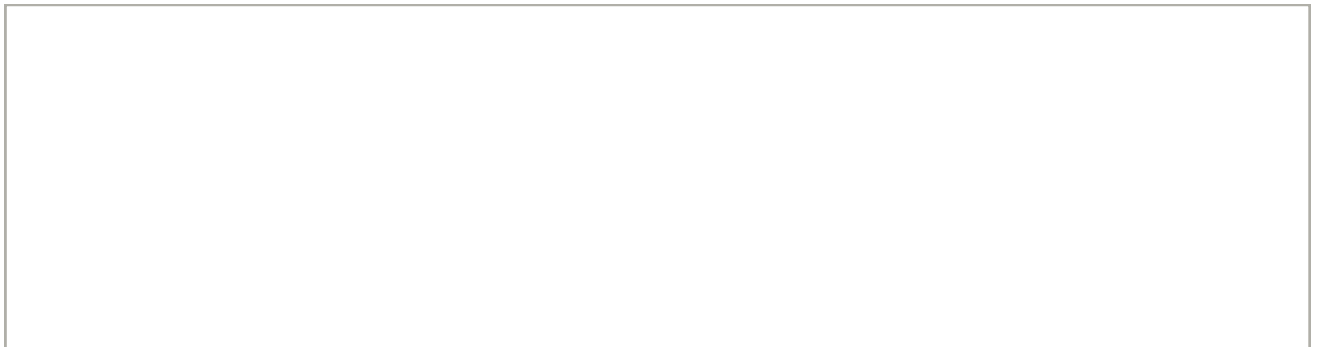
physical wellbeing



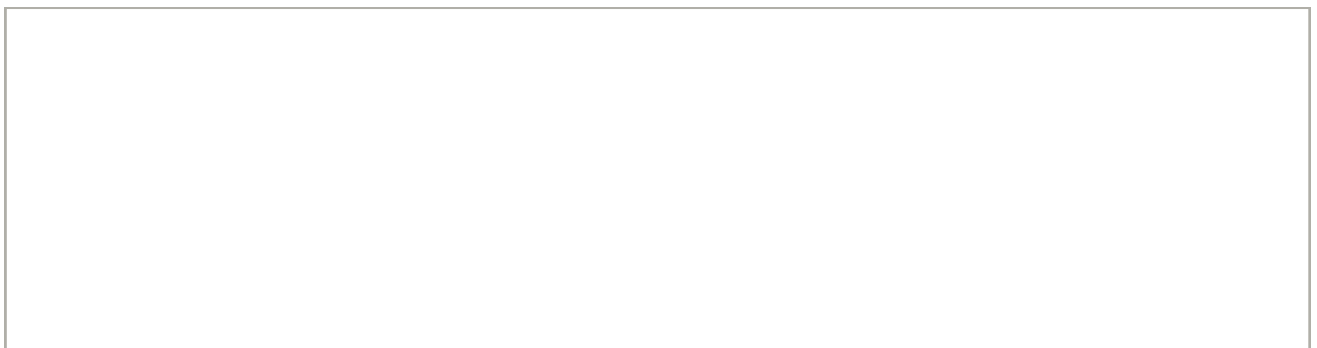
resilience



mental acuity



business / career



1 YEAR VISION BOARD

my environment

A large, empty rectangular box with a thin black border, intended for a person to draw or write about their environment.

joy & interests

A large, empty rectangular box with a thin black border, intended for a person to draw or write about their joy and interests.

social

A large, empty rectangular box with a thin black border, intended for a person to draw or write about their social life.

financial

A large, empty rectangular box with a thin black border, intended for a person to draw or write about their financial goals.

MOST IMPORTANT DAILY HABITS

Habits

1

2

3

4

5

6

7

8

9

10

MAJOR MILESTONES

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

HOUSEHOLD LIVING EXPENSES

Aligning how we spend our money with what we value allows us to live a more rich and fulfilling life. Use the following worksheet to create a 2024 budget that aligns with your most intentional life. Provide this worksheet to your Financial Advisor so that they can be sure to update your Financial Plan if necessary.

Home

Expense	Monthly	Annual
Mortgage /Rent		
Home / Renter Insurance		
Association Fees		
Electricity		
Gas/Oil		
Water / Sewer / Trash		
Phone		
Cable / Satellite		
Internet		
Lawn / Garden / Pool		
Other Maintenance / Repairs		
Property Tax		

Entertainment

Expense	Monthly	Annual
Books / Magazines / Movies / Music		
Subscriptions (Apps, Books, Music, etc.)		
Cash / Mad Money		
Live Entertainment		
Hobbies		
Club Dues		
Outdoor Recreation		

Household

Expense	Monthly	Annual
Groceries		
Dining		
Alcohol		
Child Activities		
Child Tutor		
Child Care		
Child Allowance / Expense		
Clothing - Children		
Clothing - Adults		
Hair / Nails / Grooming		
Laundry / Drycleaning		
Household Items		
Housekeeping		
Gifts		
Charitable Donations		
Pet Supplies		
Storage		

Transportation

Expense	Monthly	Annual
Car Payments		
Auto Insurance		
Fuel		
Public Transportation		
Parking / Storage		
Maintenance / Repairs		
Registration / License		

NOTES

A series of horizontal dotted lines for writing notes.

make it a great year!



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