



WEALTH WORKBOOK

Vision. Goal. Plan.

**FAMILY MEMBER EDUCATION
WORKBOOK**

Tamarind Learning™

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Top 10 Words That Reflect Your Relationship With Wealth

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Personal Vision

This Personal Vision activity is about discovering and clarifying one's hopes, dreams, and desires on a personal, professional, spiritual, community and family level. What do you hope your future to look like?

That is your personal vision.

DREAMS | HOPES | VISION
What do we need to plan for -
are there any changes coming up?



DREAMS

HOPES

VISION

Keeps Me Awake At Night (KMAANS)

In the table below, identify what keeps you up at night and segment each into one of the four categories: wealth, professional, personal, and family. This table will help you start to identify and prioritize who can help, how you can overcome the issue, and the timing around solving it.

KMAANS - What Keeps Me Awake at Night?					
Wealth 	Issue 	Hurdle 	Who Can Help? 	Outcome? 	Timing 
1.					
2.					
3.					
Professional 	Issue 	Hurdle 	Who Can Help? 	Outcome? 	Timing 
1.					
2.					
3.					

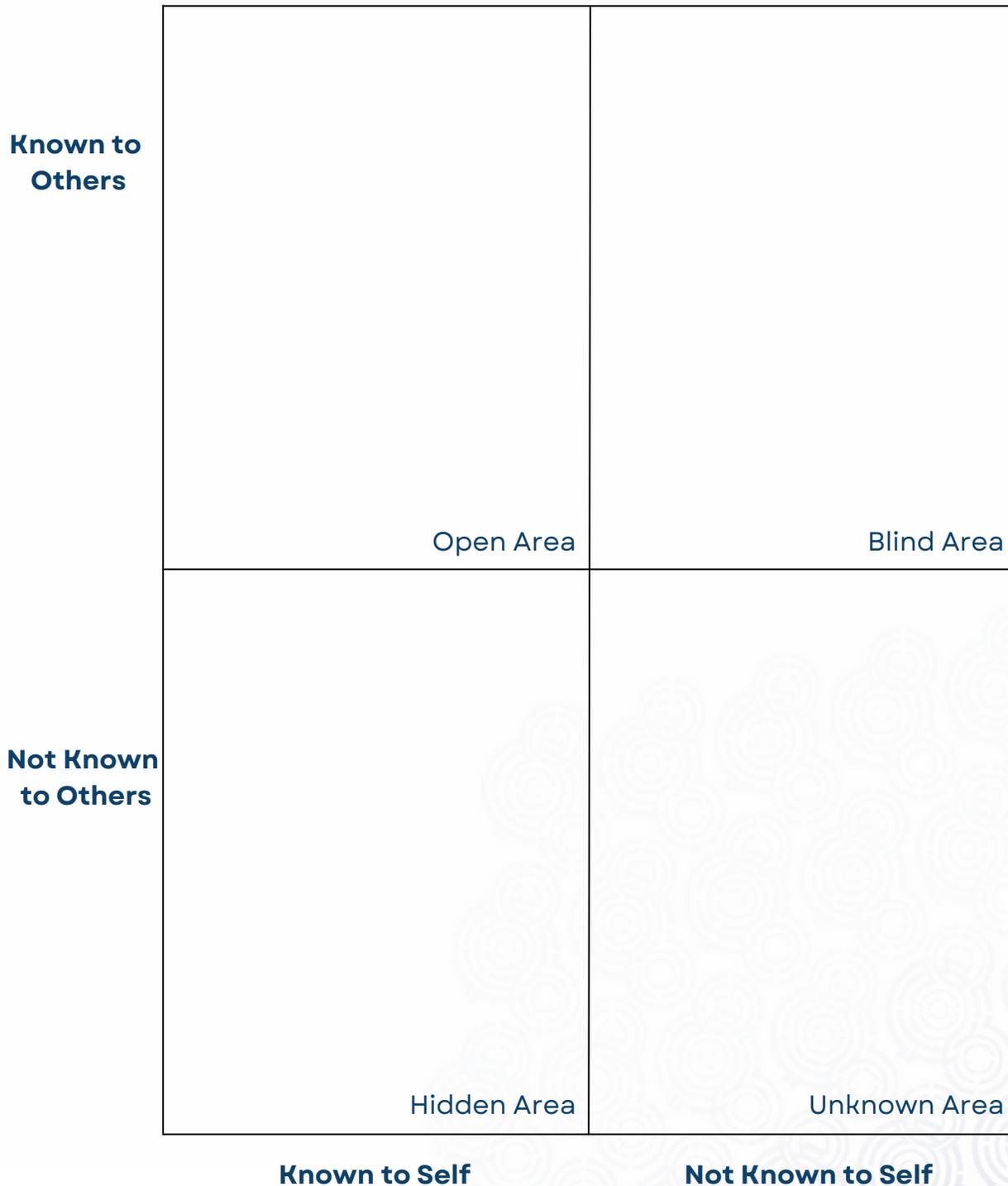
KMAANS - What Keeps Me Awake at Night?

Personal 	Issue 	Hurdle 	Who Can Help? 	Outcome? 	Timing 
1.					
2.					
3.					
Family 	Issue 	Hurdle 	Who Can Help? 	Outcome? 	Timing 
1.					
2.					
3.					

Family Wealth Window*

This activity is to get you to explore aspects of yourself, your relation to your wealth or financial means, and what people know or don't know about you, and what you know about yourself or don't know about yourself.

*Adapted from Johari's Window



Using the table below, write down your goals. Indicate the type of goal and whether it is short or long term. Write down any comments about the goal as well as specific actions you can take to achieve the goal.

Table Key

P: Personal Goal LT: Long Term Goal
 C: Career Goal ST: Short Term Goal
 F: Family Goal

Goals	P	C	F	LT	ST	Comments	Actions
1.							
2.							
3.							
4.							
5.							

