

WEALTH WORKBOOK

Vision. Goal. Plan.

FAMILY MEMBER EDUCATION WORKBOOK

Tamarind Learning™

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Words I Associate With Wealth

In the table below, write all the words that you associate with wealth. Mark one point for whether that word has a positive or negative association for you. Then write a brief description of the association you have with the word. At the end, tally the points. Are your associations generally positive or negative?

Word	+	-	Association
			<u></u>
TALLY			

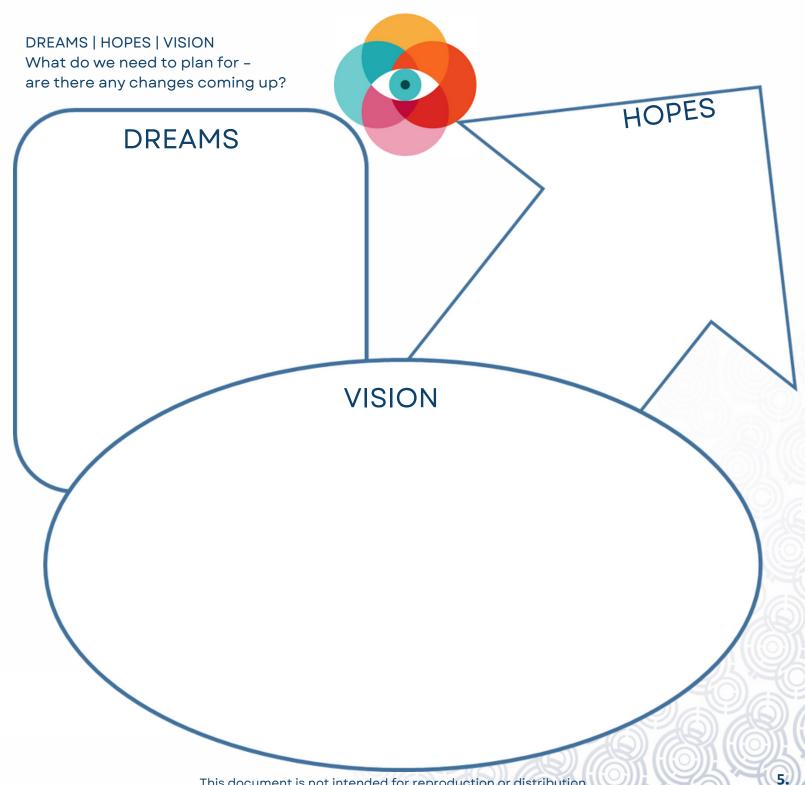
Top 10 Words That Reflect Your Relationship With Wealth

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.



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 <u>(</u>	Hurdle	Who Can Help?	Outcome?	Timing
1.					
2.					
3.					

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KMAANS - What Keeps Me Awake at Night?					
Personal	Issue	Hurdle	Who Can Help?	Outcome?	Timing
	\bigwedge	· · · · · · · · · · · · · · · · · · ·	<u>ki</u>		Q
1.					
2.					
3.					
Family	Issue	Hurdle	Who Can	Outcome?	Timing
h ffs h	Ń	· · · · · · · · · · · · · · · · · · ·	Help?		Ō
1.					61(0)
		(C			
2.					2000
7					
3.					629

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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 GoalC: Career GoalF: Family GoalLT: Long Term GoalST: Short Term Goal

	Goals	Ρ	С	F	LT	ST	Comments	Actions
1.								
2.								
3.								63
			23					
4.								
5.	(a							60
				0				
		6			9			
						3		47O)

9.

NOTES:	

NOTES:	