Personal Inventory Worksheet

***Taking Personal Inventory -***

**Personal Inventory = measure of where you are today.**

**Let’s say you decided to visit Orlando, Florida and go to Disney World, but you had never been there before. If you were to call and ask directions, what is the first thing they would ask you?**

**Unfortunately, this step is often missed by people who want to be successful. You might know where you want to go (though most people really are not all that sure), but you haven’t been willing to take the time to see where you are now. This basic step cannot be ignored.**

**The starting point – a general inventory first, then a look at different areas of your life**.

# General Personal Inventory Date:

**What things are going well for me right now?**

**What things are difficult for me right now?**

**What are my strengths? (What am I good at?)**

**What are my weaknesses? (What am I not so good at?)**

**What are my three most important projects?**

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**Who are the three most important people in my life?**

**What are my top three goals? (Long or short term)**

**What three habits would you like to develop?**

# Financial Inventory Date:

**My current monthly income is: $**

**My income sources are:**

**My total assets are: $**

**My total liabilities are: $**

**My total net worth (assets – liabilities) is: $**

**I have $ set aside for retirement I save or invest $ per month.**

**The status of my bills is: All Current Occasionally behind**

Almost always late

I enjoy my job/career Tremendously Most of the time Never What am I tolerating in this area that I no longer wish to tolerate?

# Physical/Health Date:

My current weight is: My ideal weight is:

My last complete physical was

I have the following health conditions:

Overall rating for my current health status:

Excellent Good

Fair I’m a wreck

I sleep:

Very well most nights

Pretty well most nights

OK I don’t sleep well

My diet rating is:

Healthy Good Fair

Awful

I exercise: Consistently Inconsistently Sometimes

Never

What am I tolerating in this area that I no longer wish to tolerate?

# Mental, Social and Spiritual Date:

I volunteer at the following organizations:

I would describe my circle of friends as: Extensive Stimulating

Satisfactory Supportive Limiting Nonexistent

I’m currently studying the following things:

I want to earn the following degrees or credentials:

I have a mission statement that reflects my values: Yes No

I meditate or have quiet time Regularly Sometimes Never What am I tolerating in this area that I no longer want to tolerate?

# Family and Home Date:

My relationship with my spouse or significant other is:

Extremely happy Very happy Happy Unhappy

My relationship with my children is:

Extremely happy Very happy Happy Unhappy

My relationship with my parents is:

Extremely happy Very happy Happy Unhappy

My relationship with my siblings is:

Extremely happy Very happy Happy Unhappy

My relationship with my co-workers is:

Extremely happy Very happy Happy Unhappy

How I feel about my home is: I love my home I’m happy with it

It’s OK I’m unhappy with it I vacation weeks per year.

What am I tolerating in this area that I no longer wish to tolerate?