


GRACE IN THE CAULDRON OF
CHAOS: CREATING AND PURSUING
YOUR PERSONAL STRATEGIC VISION


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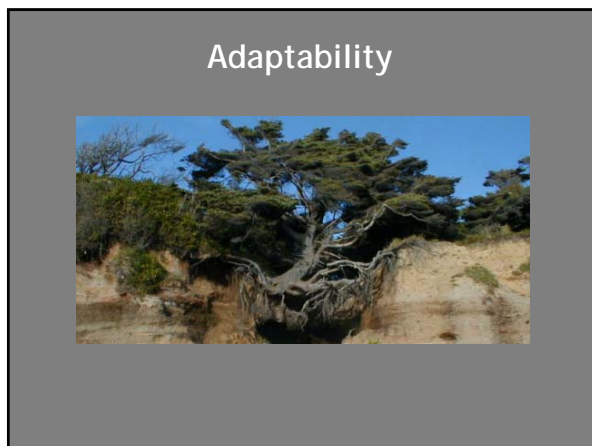
*"If you ask me what I
came into this life to do, I
will tell you:
I came to live out loud.*

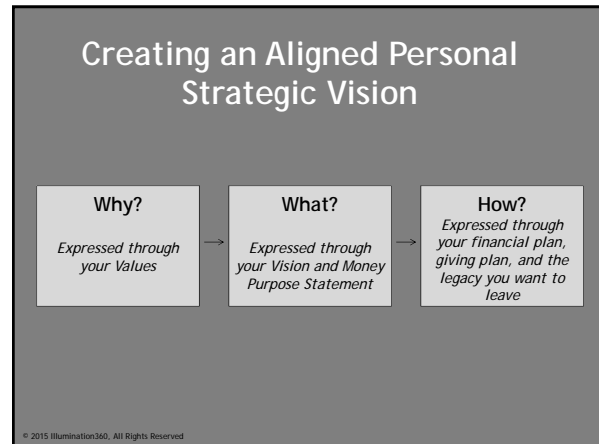
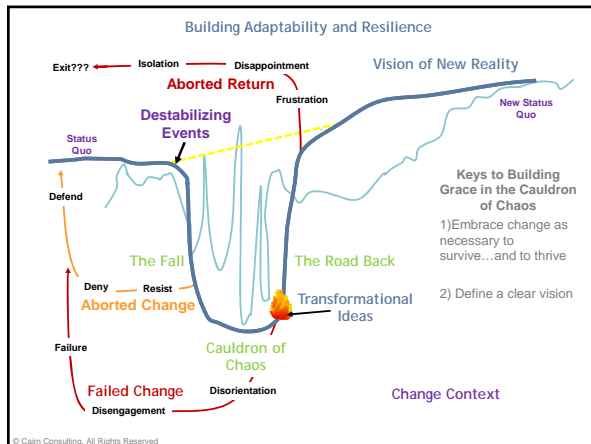
-Emile Zola

Grace in the Cauldron of Chaos:
*Creating and Pursuing Your
Personal Strategic Vision*



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Uncovering Your 'Why':

Top Motivational Values

Loyalty Compassion Integrity Helping Community Friendship Family Justice Obligation	Responsibility Tolerance Courage Risk Pleasure Freedom Innovation Personal Growth	Spiritual Growth Opportunity Effectiveness Leadership Power Equity Tradition Recognition
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Clarifying Your 'What':

Your Vision Statement

- Written in the present tense, even though it describes a future reality
- Select a timeframe that feels like it reaches into the future, but doesn't feel intangible (anywhere from 5 - 20 years)
- Try first writing one for yourself, then collaborate with your spouse/family
- Holds true whether you have money or not

Clarifying Your 'What':

Your Vision Statement

Example

My 5-year vision is that:

- I am experiencing financial success and professional fulfillment using my work as a living laboratory for my beliefs around the interconnection of Work, Self, and Spirit.
- I am experiencing deep connections with my family created through the dedicated time we spend together.
- I am deepening my spiritual practice through daily meditation and contemplation.

Clarifying Your 'What':

Your Vision Statement

Example

My 20-year vision is that:

- I am experiencing the joy in MY definition of 'retirement':
 - I have the financial security to choose if I want to work;
 - I am only working on projects that inspire me and use my gifts and expertise;
 - I create significant time for travel and new experiences with my partner.

Clarifying Your 'What':

Wealth Purpose Statement

- Where your Vision and Values meet your money
- Designed to help you clarify the purpose for your wealth
- Gives you a 'litmus test' of how consistently you spend/save in accordance with your Values and Vision
- Gives purpose to what you save and how you spend or how you invest

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Clarifying Your 'What':

Wealth Purpose Statement

Example

The purpose of my wealth is to create security for myself and my family. After that it will be used to create the opportunity for life experiences. I will consciously choose experiences over the accumulation of possessions.

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Clarifying Your 'What':

Wealth Purpose Statement

Example

The purpose of my wealth is to empower my children and the organizations I support. My money will not hinder the thriving of the people and the organizations I love.

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Identifying Your 'How':

Financial, Giving, and Legacy Plans

"You can't plow a field by simply turning it over in your mind."

- Gordon B. Hinkley

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How much is enough?

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