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Find Your Landing Zone - Thinking of Life Beyond the Bar

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Find Your Landing Zone

WORKBOOK



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How are you? I'm busy.

How Busy Am I?

a. Name three things you missed out on because you were too busy:

SEE YOUR FUTURE—DON'T WANDER INTO IT

Exercise 1: Write Your Epitaph

Stop for a few moments to think about how you would like to be remembered. Take a piece of paper or open a blank document on your computer screen. Jot down one or two sentences. You don't need to be expansive, dramatic, or poetic unless you wish. This is just for you—no need to share it with anyone unless you're so inspired. If you really like your work, put it with your estate plan for future use. You can still have a say even after your final day.

WHERE ARE YOU GOING?

Identifying Goals:

1. List 5 or 10 things you want to accomplish in your life.

2. Identify the three you could start to work on in the next 12 months.

3. Highlight one of the objectives that you can start working on today.

Exercise 3 ~ Distractions and Obstacles:

Write down three snags that might interfere with your progress:

- 1.
- 2.
- 3.

TO KNOW WHERE YOU'RE GOING, KNOW WHERE YOU'VE BEEN

List the three professional accomplishments you're most proud of.

- 1. 2.
- 3.

Personal Accomplishments:

Name three personal accomplishments which, at any time in your life, brought you satisfaction:

1. 2. 3.

Jot down the three skills you brought to the table that contributed to these professional and personal successes.

- 1.
- 2.
- 3.

SOME MONEY QUESTIONS

These questions require some quiet time, privacy, and access to your personal financial information. We'll touch on them in the presentation, but this is part of your homework.

Three Basic Questions to Ask Yourself:

- 1. How much is enough?
- 2. What economic resources do I truly need to shift gears, change jobs, transition to another phase of life, or simply retire? In other words: what do I spend?
- 3. If you are fortunate to, at some point, have sufficient resources to care for yourself and your loved one, what is the purpose of any money that exceeds what you need?

Exercise 2 ~ What is Your Spending Target?

- 1. How much do you currently spend? (Make a household budget and leave nothing out)
- 2. How can you adjust your budget to ensure more retirement savings?
- 3. What are your most expensive debts?
- 4. What can you do to get rid of them?

ASK FOR ADVICE

Help Finding Help:

Who can help you plan the next phase of your life? If no names come to mind, write in the names of people you could ask to recommend someone who can help you.

Resource 1: Resource 2 Resource 3:

SELLING YOUR TALENTS TO THE FIRM

Exercise 1: What's of Most Importance to You:

In order of priority, list three things you want to get out of your negotiations with your firm:

- 1. 2.
- 3.

Exercise 2: What's Your Bargaining Power?

List three things you offer to the firm that support you in getting what you want:

- 1.
- 2.
- 3.

YOU GOTTA HAVE A PLAN

Create Your Action Plan:

Create an action plan to begin accomplishing that one objective you can start on now.

- 1. Identify the objective.
- 2. Write out what you will need to do to get there.
- 3. Now, break it down into manageable pieces; create a path to regular accomplishments.
- 4. Calendar time each week to either reflect on your goal or to work on it.
- 5. Hold yourself accountable by:
 - Telling someone that you're working on this goal. Choose someone who will be honest with you in your discussions about your goal and will follow up and ask how your work is coming along.
 - Put on your calendar the dates by which you will accomplish each of the steps required to achieve your goal.