

# *8-Step Workbook*

## *CEO of Your Life Program*

### Lesson 1

*Facilitator*

**Jerry Bergner, AAMS CMFC**  
jsbergner@ilafp.com



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## Step 1: Review and Reveal Your Immediate Past

Like any successful corporation, as individuals we can best begin planning for the future by assessing our immediate past. To do this, we ask you to look back over the last 12 months and reflect on what you've *done* (Time spent, Money spent, Values present or missing) and some of the results (Feelings) of your efforts.

This CEO of your Life™ Workshop is of necessity a fast-paced, intensive experience. You will have a much better chance of achieving your Workshop goals if you arrive well-prepared. Below you will find **four exercises** that we believe are essential to an effective preparation.

Keep in mind that this work is for your benefit and your benefit alone. You may want to share some of your findings with others to help you gain perspective but whether you do or not is up to you.

*That Was the Year That Was...*

### Step 1.1: Time Spent

Review your calendar/diary/journal for the last 12 months and list your major commitments of time and energy in which you were involved. Include major projects (“completed our lake house”), one-off events (“July 4<sup>th</sup> picnic with Uncle George and my cousins, Gomer and Goober”), recurring activities (“daily training for my first marathon”), and mental or relational events. (“counseling my sister through her divorce”).

*Last year's most significant events and activities:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_
- 11. \_\_\_\_\_
- 12. \_\_\_\_\_
- 13. \_\_\_\_\_
- 14. \_\_\_\_\_
- 15. \_\_\_\_\_
- 16. \_\_\_\_\_
- 17. \_\_\_\_\_
- 18. \_\_\_\_\_
- 19. \_\_\_\_\_
- 20. \_\_\_\_\_
- 21. \_\_\_\_\_
- 22. \_\_\_\_\_
- 23. \_\_\_\_\_
- 24. \_\_\_\_\_
- 25. \_\_\_\_\_
- 26. \_\_\_\_\_
- 27. \_\_\_\_\_
- 28. \_\_\_\_\_

## Step 1.2: Money Spent

Review your financial records for the last 12 months and enter your TOTAL household line item expenditures below. **You will not be asked to share this financial information.**

Use your last calendar year summary if this is what you currently have available.

While you want to use the best data you have, remember that “perfect” is the enemy of “good enough to start with”.

<i>LINE ITEMS</i>	<i>MONTHLY AVERAGE</i>
FOOD	
— At Home/Groceries	
— Away from Home/ Dining Out	
MORTGAGE/RENT	
UTILITIES	
— Electricity	
— Gas	
— Water	
— Phone: Land Line	
— Phone: Mobile	
— Cable/DSL	
INSURANCE	
— Life	
— Medical/Long-Term Care	
— Home	
— Liability/Disability	
— Auto[s]	
FURNISHINGS	
SERVICES	
— House Cleaning	
— Other	
EQUIPMENT	
CLOTHES	
TRANSPORT/AUTOS	

CHILDREN	
— Clothes	
— Activities	
— School	
INSTALLMENTS	
1.	
2.	
ALIMONY/SUPPORT	
PARENTAL SUPPORT	
LEISURE/ENTERTAINMENT	
GIFTS	
CONTRIBUTIONS	
EDUCATION	
MEDICAL	
DENTAL	
TAXES	
— Income: Federal	
— Income: State	
— Property: House	
— Property: Car/Boats/etc.	
SAVINGS	
OTHER EXPENSES	
—	
—	
—	
—	

### Step 1.3: Values Present (or Missing)

Here we are asking you to assess the presence or absence in your life of your core values over the last 12 months.

Styles and skills produce economic and social benefits and as such may be considered assets. More fundamental are the values that drive you towards the acquisition, maintenance and presentation of certain styles and skills.

Below, please assign one of 3 levels of personal **Importance (IMP)** among the personal values listed. Ascribe 20 points to values “extremely important” to you, 10 points to values “important” to you and 0 points to values which are “least important” to you.

Add any values not listed that are important to you.

Next, determine the level of **Presence (PRS)** of these values in your life last year.

Ascribe 20 points to values which were “very present”, 10 to values that were “somewhat present”, and 0 points to those that were missing altogether.

VALUES	POINTS		Description: “To.....”
	IMP	PRS	
Leadership			inspire & lead others to achieve goals
Expertise			have great skill and knowledge in a particular field
Prestige			be well-known, recognized, acknowledged
Service			help others, particularly those needing help
Money			earn a good deal of money relative to others
Independence			feel free and unconstrained
Affection			enjoy love and friendship with family and friends
Security			feel confident and stable as regards work and finance
Self-Realization			realize one’s full life potential
Spirituality			pursue ultimate ideas or principles
Joy			enjoy life, to be happy and content
Power			be influential—a force to be reckoned with
Excitement			have experiences that stimulate the flow of adrenalin
Relationship			be a full member of the group(s) to which you belong
Health			feel and be physically and emotionally well
1.			
2.			
3.			
4.			

The summary below can help identify values important to you which are not being fully met in your life today (Values missing) and values which are being more than met (Values too present).

Place an “x” beside those values where either their being “missing” or “too present” concerns you.

<i>VALUES</i>	<i>MISSING VALUES</i>	<i>VALUES TOO PRESENT</i>
Leadership		
Expertise		
Prestige		
Service		
Money		
Independence		
Affection		
Security		
Self-Realization		
Spirituality		
Joy		
Power		
Excitement		
Relationship		
Health		
1.		
2.		
3.		
4.		

**Step 1.4: FEELINGS**

Reflect on how you have felt over the last 12 months. Indicate how you felt each month by placing an "X" in the appropriate cell as we have done in this sample.

MONTH	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
													9
Felt Very Good	X												8
			X										7
											X		6
Felt Good		X										X	5
										X			4
				X									3
Felt OK									X				2
					X								1
													-1
Felt Not OK								X					-2
							X						-3
													-4
Felt Bad						X							-5
													-6
													-7
Felt Very Bad													-8
													-9



My Feelings throughout the year...

<b>MONTH</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	
													9
Felt Very Good													8
													7
													6
Felt Good													5
													4
													3
Felt OK													2
													1
													-1
Felt Not OK													-2
													-3
													-4
Felt Bad													-5
													-6
													-7
Felt Very Bad													-8
													-9

Below, for times when you “felt Good” or “felt very Good” last year, give a short description of “What was going on”? In the right hand column list any specific “Time, money and/or value issues” you associate with these feelings.

Times when you “felt Good” or “felt very Good” last year.....

***WHAT WAS GOING ON?***

***TIME, MONEY AND/OR  
VALUE ISSUES PRESENT***

1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
6. _____	6. _____
7. _____	7. _____
8. _____	8. _____

Now, for times when you “felt Bad” or “felt very Bad”, give a short description of what was going on. In the right hand column list any specific “time, money and/or value issues” you associate with these feelings.

Times when you “felt Bad” or “felt very Bad” last year....

<i>WHAT WAS GOING ON?</i>	<i>TIME, MONEY AND/OR VALUE ISSUES PRESENT</i>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
6. _____	6. _____
7. _____	7. _____
8. _____	8. _____

**Summary: Annual Report Pre-work**

Please record your answers to the following questions in the spaces below.

***TIME: The Last 12 Months***

As you reflect on the personal events that you recorded about your past 12 months...

- What stands out in your mind?
- What themes or issues are important to note?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_
7. \_\_\_\_\_  
\_\_\_\_\_

**VALUES: The Last 12 Months**

What were your most important values last year missing or present?

- Which were missing or too present?
- Any learnings from this exercise to record?

1. \_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_

6. \_\_\_\_\_  
\_\_\_\_\_

7. \_\_\_\_\_  
\_\_\_\_\_

**MONEY: The Last 12 Months**

As you look at how you spent your money last year...

— What if anything, pleases, concerns or surprises you?

- 1. \_\_\_\_\_  
\_\_\_\_\_
- 2. \_\_\_\_\_  
\_\_\_\_\_
- 3. \_\_\_\_\_  
\_\_\_\_\_
- 4. \_\_\_\_\_  
\_\_\_\_\_
- 5. \_\_\_\_\_  
\_\_\_\_\_
- 6. \_\_\_\_\_  
\_\_\_\_\_
- 7. \_\_\_\_\_  
\_\_\_\_\_

***FEELINGS: The Last 12 Months***

- What was the overall feeling tone of your last 12 months?
- What were high and low points that are important to note, if any?
- What did your graph tell you?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_
7. \_\_\_\_\_  
\_\_\_\_\_

***THAT'S IT FOR PREPARATION!***

Thank you for investing your time and energy in this first part of our work. Next, we begin analyzing this data to build the foundation for your ***CEO of your Life™ Plan.***

My Big Picture



*C'est la Vie*

**Ackland, Vassar,  
and the Palmer:  
Traveling in Style**

