

LOOKING BACK LOOKING FORWARD



Living in the past or trying to predict the future takes our focus off the present where we can learn, act, and influence our lives. This exercise provides a framework for productive reflection and prioritizes your focus on future improvements that will make the most meaningful impact.

Looking Back

Looking back on our past helps us learn from the decisions and habits that have been successful or that may set us back. Reflection also helps us to observe what has changed in our circumstances that might require our attention.

Which accomplishments are you most proud of professionally and personally? Why?

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What's the best and worst decision you made and why?

A large, empty rectangular area with a light blue background, intended for the user to write their answers to the question above.

An SEC-Registered Investment Adviser

600 W HAMILTON St, SUITE 510 | ALLENTOWN, PA 18101 | 610.709.5072 | mortonbrownfw.com

What's the most important thing you learned?

On a scale of 1 to 10, with 10 being "outstanding", how do you feel about your overall progress and why?

What are you most disappointed about as it relates to the past year?

What do you think you could have done differently to avoid this disappointment?

What blind spot do you think was revealed to you?



What key relationship did you fall short on fostering this year?



What key relationship did you improve significantly this year?



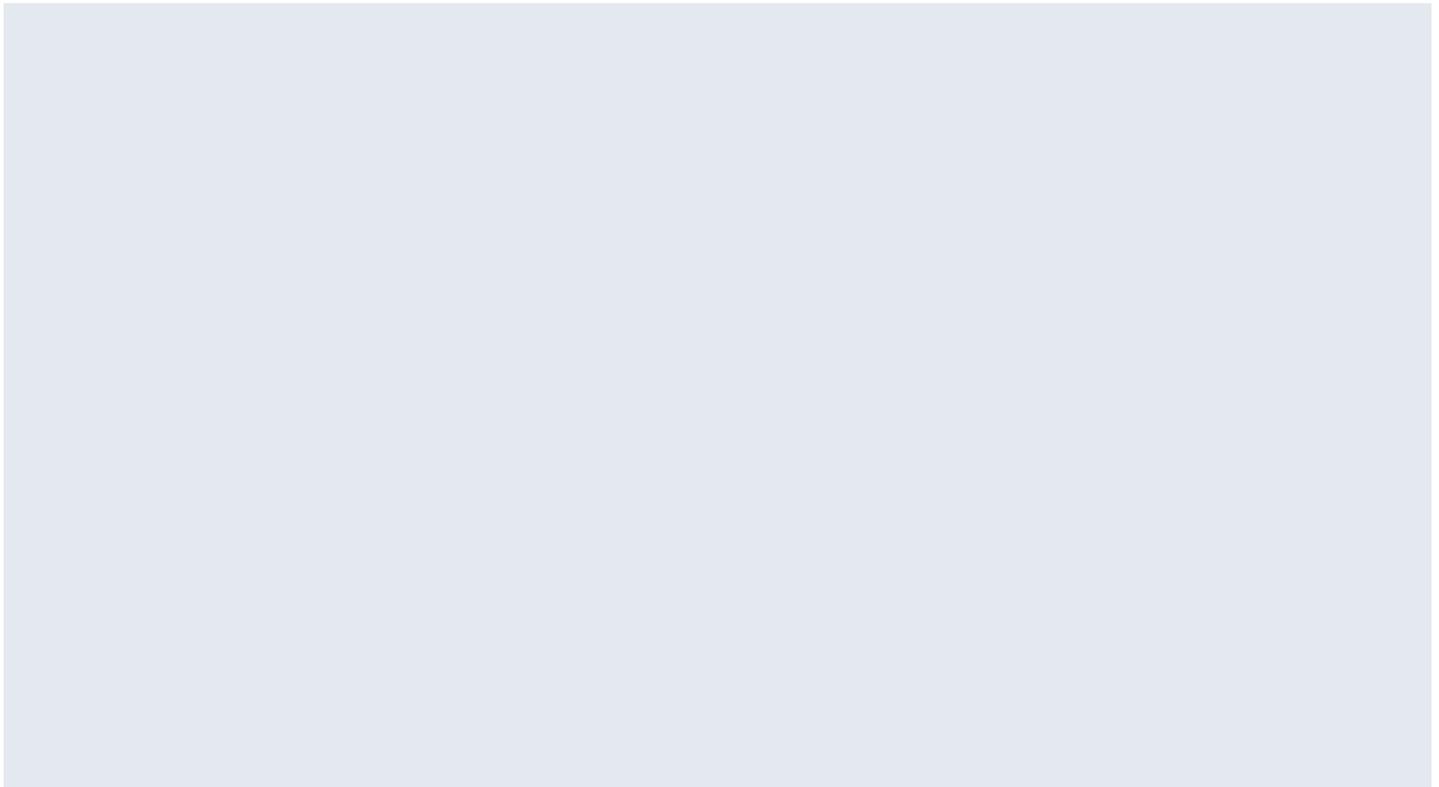
If you died in your sleep tonight, what if any unfinished aspect of your life - that you can actively influence - would cause you the most pain for not having completed?



Looking Forward

Now that you've spent some time in the past, it's time to look to the future. Allow this to serve as a guide to prioritizing steps you can take in the present to create a meaningful and fulfilling year ahead.

What is the one HIT (Huge, Inspiring, Transformational) goal for the year ahead that, when achieved, will make your year a 10 out of 10? Start with 5-7 potential goals and then narrow it down to just one.



What skills, activities, behaviors, mindsets, etc. do you need to learn or improve on this year to achieve your HIT goal?



Write down three words that encapsulate your focus for the year ahead, give you direction, and excite you as you move through the next 12 months.

Which key relationship(s) will you commit to improving in the new year?

What will you commit to doing to improve your health in the new year?

What will you commit to doing to serve people other than family, colleagues, and clients in the new year?

At Morton Brown Family Wealth, we practice financial planning that extends beyond the numbers to help our clients live their best lives. If you have questions, we are here to help.