

# **PERSONAL RETREAT**

## **WORKBOOK**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

## focus | fo•cus

**NOUN** Maximum clarity.

**VERB** Bring something into alignment.  
Direct one's attention on something.

.....

## Your Retreat Checklist

When packing for your retreat getaway, the aim is to pack just enough "tools" to be able to write down and journal your ideas. Avoid anything that could be a distraction or an escape from your thinking time.

Here is a suggested list, but feel free to modify based on your own needs and preferences.

- |   |  |
|---|--|
| <input type="checkbox"/> Pens / Pencils                   | <i>If staying overnight...</i>                 |
| <input type="checkbox"/> Headphones & Music               |  |
| <input type="checkbox"/> Notebook for writing, journaling | <input type="checkbox"/> Change of clothes     |
| <input type="checkbox"/> This retreat workbook            | <input type="checkbox"/> Dopp kit              |
| <input type="checkbox"/> Food, snacks, and drinks         | <input type="checkbox"/> Charging cables, etc. |

# Core Values

Use the list below as you consider what values are most important in your life right now. Circle any of the values that matter most deeply to you.

Action-Oriented	Adaptability	Adventurous	Ambitious
Assertive	Authentic	Belonging	Caring
Cheerfulness	Communication	Community	Compassionate
Consistency	Confidence	Conviction	Courageousness
Courteous	Curiosity	Decisiveness	Diligence
Empathy	Excellence	Excitement	Faith
Focused	Forgiveness	Friendliness	Full of Integrity
Generosity	Grace	Gusto	Happiness
Hope	Humility	Independence	Joyfulness
Justice	Kindness	Knowledge	Leadership
Listener	Loving	Loyalty	Mannerly
Open-Mindedness	Organized	Parenting	Passionate
Patience	Personable	Promptness	Respectfulness
Rest	Self-Sufficiency	Sober-Mindedness	Sound Judgment
Stewardship	Studios	Sympathetic	Teachable
Tidiness	Trustworthiness	Uniqueness	Unity
Unselfishness	Usefulness	Vision	Vulnerability
Wealth	Wholeheartedness	Wisdom	Wonder
_____	_____	_____	_____
_____	_____	_____	_____

*Write your own, unique values in the spaces provided if you don't see some of your core values already listed.*

Use the guiding questions below as you consider what values are most important in your life right now.

- What legacy would you like to leave behind?
- What are you passionate about?
- What really makes you happy in life?
- What do you value?
- What do you refuse to do?
- How do you measure success?
- How will people remember you?

## Choosing Your Core Values

List your 2 - 3 core values below.

1

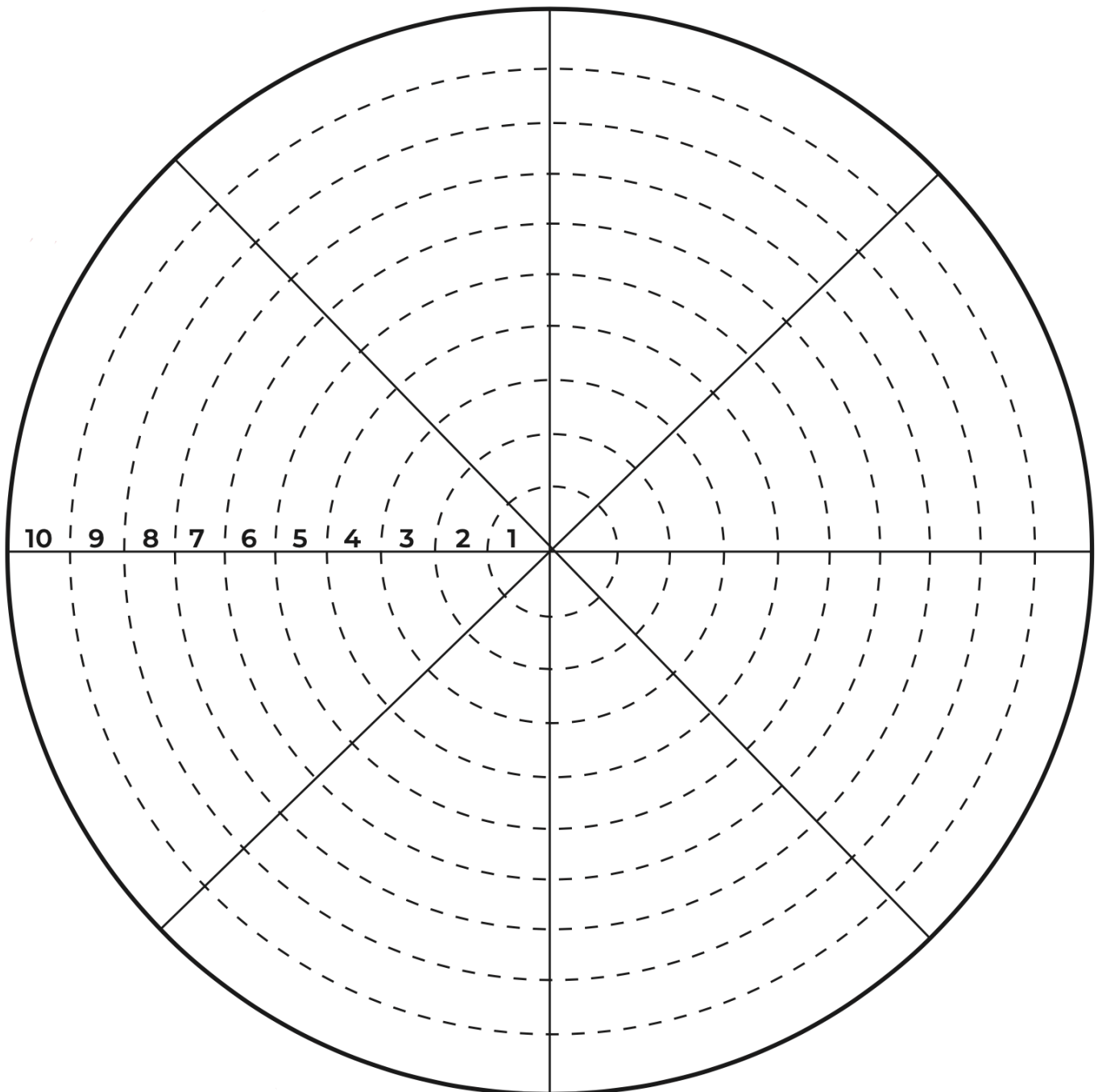
2

3

# Life Assessment

On a scale of 1 - 10, how would you rate the clarity, health, and vibrancy of each area of your life?

1. Inner-Personal and Spiritual Life
2. Mental and Emotional State
3. Health and Fitness
4. Relationship with Significant Other
5. Relationships with Friends and Family
6. Rest and Recovery Time
7. Career
8. Finances



**JOB / CAREER**

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*What's going well?*

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*What could be better?*

**HOBBIES &  
SIDE-INTERESTS**

---

*What's going well?*

---

*What could be better?*

**RELATIONSHIP WITH  
SIGNIFICANT OTHER**

---

*What's going well?*

---

*What could be better?*

**RELATIONSHIP WITH  
MY KIDS**

---

*What's going well?*

---

*What could be better?*

**RELATIONSHIPS WITH  
FRIENDS AND FAMILY**

---

*What's going well?*

---

*What could be better?*

**INNER PERSONAL &  
SPIRITUAL LIFE**

---

*What's going well?*

---

*What could be better?*

**MY EMOTIONAL STATE**

---

*What's going well?*

---

*What could be better?*

**MY MENTAL STATE**

---

*What's going well?*

---

*What could be better?*

**MY PHYSICAL HEALTH**

---

*What's going well?*

---

*What could be better?*

**REST TIME, DOWN TIME,  
AND "PLAY" TIME**

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*What's going well?*

---

*What could be better?*

**MY FINANCES**

---

*What's going well?*

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*What could be better?*

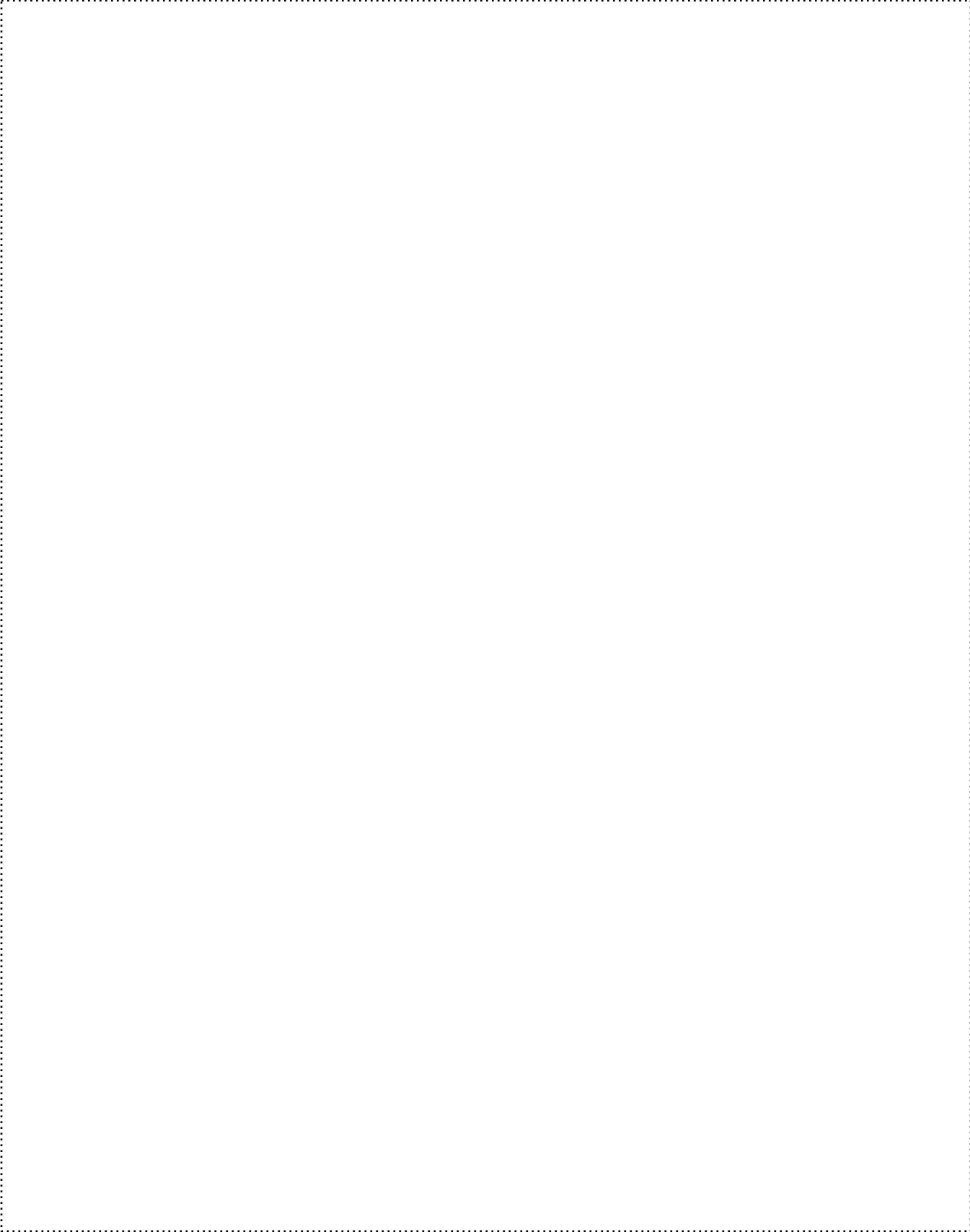
# Personal Margin Assessment

How much margin do you feel that you have in each area? How much space is there between your load and your limit? **Circle the amount of margin you currently have in each area.**

<b>Time</b>	<p>Negative margin                      Little to no margin                      Okay, but not okay                      Enough margin                      Plenty of margin</p>
	<p><i>My schedule is out of control. I am burning the candle at both ends. I have no time for things that matter most.</i></p> <p style="text-align: right;"><i>My days are spent on the things I need and want to do. I have time for resting and recharging. I am flexible.</i></p>
<b>Finances</b>	<p>Negative margin                      Little to no margin                      Okay, but not okay                      Enough margin                      Plenty of margin</p>
	<p><i>I have a significant amount of debt, I struggle to live within my means, and I tend to make irrational financial decisions.</i></p> <p style="text-align: right;"><i>I have a healthy emergency fund, I am debt free, I live within my means, and I am planning for the future.</i></p>
<b>Emotions</b>	<p>Negative margin                      Little to no margin                      Okay, but not okay                      Enough margin                      Plenty of margin</p>
	<p><i>I have very little margin for dealing with anyone's issues. I feel frustrated, exhausted, and burnt out.</i></p> <p style="text-align: right;"><i>I am emotionally present and engaged. I am able to engage people and circumstances with my heart intact.</i></p>
<b>Creative</b>	<p>Negative margin                      Little to no margin                      Okay, but not okay                      Enough margin                      Plenty of margin</p>
	<p><i>I can't seem to focus on anything these days. I am lacking inspiration.</i></p> <p style="text-align: right;"><i>I am excited to work on challenging problems or to dream up new ideas.. I know what inspires me. I am always learning.</i></p>
<b>Health</b>	<p>Negative margin                      Little to no margin                      Okay, but not okay                      Enough margin                      Plenty of margin</p>
	<p><i>I don't sleep well. I don't feel well. There is no consistency to my exercise or diet. I need coffee and stimulants to get me through the day.</i></p> <p style="text-align: right;"><i>I consistently a full-night sleep. I eat well and incorporate exercise into my week. I have the energy I need to tackle life.</i></p>

# Your Ideal Future

What does a day in the life of future you (5 years from now) look like? Describe your ideal future in as much detail as possible.





# The Retrospective

**In the past few months, what have I accomplished?**

Empty space for writing answers to the question: "In the past few months, what have I accomplished?"

**What went well?**

Empty space for writing answers to the question: "What went well?"

**What could have gone better?**

Empty space for writing answers to the question: "What could have gone better?"



# Upcoming Goals

## Goal #1 :

Milestones

Daily Tasks & Habits

## Goal #2 :

Milestones

Daily Tasks & Habits

## Goal #3 :

Milestones

Daily Tasks & Habits

