



WEALTH PLANNING

Light Up Your Desires In Business & Life

Before you can build a business or a life that you love, you have to take time to consider who you desire to be, what you desire to do, and what you desire to have in both business and life. Then, and only then, can you start building the roadmap to get you from where you are now to where you desire to be.

While parts of this exercise are geared towards entrepreneurs, it is still applicable to partners and spouses and friends who are not business owners! In fact, if you are partnered with anyone, in business or in life, it's beneficial to have them complete this exercise with you so you can look at your answers together. You will see where you align, where you differ, and you can use this as an invitation to have thoughtful and interesting conversations about what you each want for your future.

It is my sincerest hope that you enjoy this exercise, and that it helps you start creating the business and life that you desire. And if you are ready to see how your finances can align with your desires, connect with me at Hannah.chapman@x2wealthplanning.com to schedule an exploration call. I empower visionary entrepreneurs to stop worrying about money, take charge of their income, and build their legacy with joy and ease, and I'd love to meet you.

Warmly,

Hannah Chapman

Hannah Chapman, CFP®, APMA®, CRPC®

Entrepreneurial Wealth Coach, Financial Advisor, Founder of X² Wealth Planning

x2wealthplanning.com

513.783.2088

Journal Prompts

What do you desire to do that's different from what you're doing right now?

→ Ideas to jog your imagination: travel more, speak on stages, give to more charitable causes, start a new hobby, downsize, live abroad...allow yourself to be creative!

What do you desire to have that's different from what you have right now?

→ Ideas to jog your imagination: new house, second house, more help at work or at home, less stuff, less stress...again, allow yourself to be creative!

Who do you desire to be that's different from who you are right now?

→ Ideas to jog your imagination: a CEO working on the business rather than in the business, a premier provider in your industry, more spacious, more joyful...be kind to yourself here.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

What do you most want to accomplish this year in your personal life?

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

What do you think about when you consider “retirement” as a concept? Does it appeal to you, or do you imagine something different for that stage of life? Describe it here.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

If you have children, what do you desire to provide for education now and as a family legacy in the future? What do you want to leave monetarily? What impact do you want your family legacy to have on the world?

[illegible]

If you could imagine the most beautiful life possible, 30 years down the road, what does that look like?

Where are you?

What are you doing?

Who are you with?

How does it feel?

Do the same for your business. If you could imagine the most meaningful business possible, what does that look like?

Who do you desire to help?

What impact are you having on them?

How much money are you making?

How many employees do you have? How do you interact with them?

How do you feel about your business?

What legacy is your business leaving in the world?

Congratulations!

You just spent time doing an exploration of what you want in business and in life that you can use to help focus your time and attention so that you're truly building a life that you love. And if you're ready to turn these dreams and desires into a roadmap that you can use to accomplish everything you want to do in life, let's talk.

Connect with me at Hannah.chapman@x2wealthplanning.com to schedule an exploration call.

I'm rooting for you all the way and can't wait to meet you.



Hannah Chapman, CFP®, APMA®, CRPC®
Entrepreneurial Wealth Coach, Financial Advisor
x2wealthplanning.com
513.783.2088