



2026 Vision Session for Couples (though it works for anyone)

- Step 1: Schedule 48 hours to get away.
- Step 2: Find someone to watch your kids.
- Step 3: Book a hotel room. A nice one.
- Step 4: Schedule a really nice dinner and some fun.
- Step 5: Turn the page and get started!

Definitions for use later:

1. **Live**
Day-to-day spending that supports your lifestyle: housing, travel, experiences, and the things that make life meaningful right now
2. **Give**
Charitable giving, family support, and generosity goals. How you'd like your resources to positively impact others.
3. **Owe**
Current and future obligations: mortgages, loans, taxes, and any planned debt reduction or payoff strategies.
4. **Grow**
Saving and investing for the future: retirement, long-term goals, and building wealth over time.



A Look Back at 2025

Write down the highlights/wins in each category for the year.

FAMILY / WORK / FRIENDS

Quarter 1 (January 1, 2025 – March 30, 2025)

Quarter 2 (April 1, 2025 – June 30, 2025)



Quarter 3 (July 1, 2025 – September 30, 2025)

Quarter 4 (October 1, 2025 – December 31, 2025)

Reflection Questions

Family

1. What are some family rhythms that were meaningful and brought us closer together?
2. What were some of our hardest moments during the year that we don't want to repeat?

Fullness

1. How do I feel about my current level of fitness?
2. What new things did I learn this year?
3. What was the best book I read?
4. What is my favorite podcast of the year?
5. What new friends did I make this year?
6. Who are my 3 closest friends?
7. Who are my 10 closest friends/relationships?
8. What relationships are currently draining and in need of some detachment?
9. What experiences this year were most life giving to me?
10. How did I take time to recharge throughout the year? What were the best ways for doing that?

Fun

1. What were some moments where I felt like my 10 year old self?
2. What were some of the least fun moments?

Finances

1. How did our expenses break down among the following areas: Live/Give/Owe/Grow?
2. How do we feel about the % in each of these categories?
3. What were the best investments that we made this year?
4. What were some of the worst?
5. Update Balance Sheet / Net Worth Statement.

Business

1. What were the biggest wins of the past year?
2. What were the activities that really moved the needle this past year?

Overall Reflections

1. What were the biggest disappointments from last year?
2. What were any goals that I set out to achieve, but didn't make much progress?
3. What major life lessons did I learn this past year?
4. What are some lies that I am believing right now? About myself? About the world?
About my family?

A LOOK AHEAD at 2026

Where would I like to be 12 months from now?

Family

1. Where would I like our family to be in 12 months?
2. What are some family rhythms that we need to:
 - a. Start
 - b. Stop
 - c. Continue
3. What vacations do we want to take in the next 3 years?
4. What intentional moments do we want to mark this year for each of our kids?

Fitness

1. Start
2. Stop
3. Continue

Learning

1. What do I want to know more about?
2. How can I schedule time to read/write/listen?
3. What experiences do I want to be a part of that give me life?

Friends

1. Who are friends who are life giving? How often can I put them on my calendar?
2. Who are friends that I need to detach from right now?

Fun

1. What are some experiences that I want to be a part of this year?
2. How can I cultivate fun around my friends and family this year?

Finances

5. What do I want our Live / Give / Owe / Grow percentages to be?
6. What investments would I like to make this year?
7. What investments do I need to stop making? Where are we not seeing a return anymore?

Business

1. What do I need to schedule to really move the needle this year?