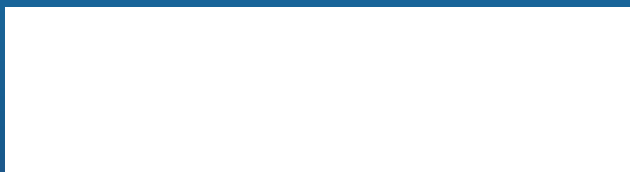


A large graphic of a sunburst with white rays radiating from a central white circle against a blue background. The rays extend across the top half of the page.

LAUNCH TAKE ACTION PLAN



To assist you with integrating the LAUNCH program content in your business, we have designed this Take Action Plan. Go through this Action Plan and fill it out as if you were the client.

Approach Talk Practice (Decision 2): Wealth Optimization System™

Use the space below to draw out the Wealth Optimization System™ as if you were sitting with a prospect.

Discovery Practice (Decision 3): Values

Values

Discover Your Values Exercise

The Discover Your Values Exercise will help you identify the values by which you would ideally live your life. It is important that you think about the “ideal you” and the “real you” when completing this exercise. With some people, the real and ideal are closely matched, while others have real gaps. This exercise will be the first step in providing clarity around your alignment.

Instructions:

1. Look through the list of values and select the top 15 that are the most important to you. There is a blank value listed as “other” in the event that you don’t see a value in the list and would like to write your own.
2. Narrow down the top 15 to the top 10 values.
3. Then narrow down the top 10 to the top 5 values.
4. Once you have your top 5 values selected, provide an example of a time in your life when each of these values was present. This part of the exercise will either validate your list or cause you to re-think one or two of them.

Discovery Practice (Decision 3): Values

<p>Honesty To be truthful and forthright</p>	<p>Community Cooperating and identifying with others with shared interests</p>	<p>Diligence Steady and continual progress towards outcomes</p>
<p>Diversity Appreciation of individual differences</p>	<p>Fun Play, laughter and the ability to be amused</p>	<p>Integrity Being honest and having strong moral principles</p>
<p>Enjoyment I value the pursuit of pleasure and delight</p>	<p>Freedom Liberty to act and speak without restriction</p>	<p>Dependability To be reliable and trustworthy</p>
<p>Happiness Contentment, satisfaction and fulfillment</p>	<p>Health The importance of physical fitness and emotional well-being</p>	<p>Growth To keep changing and growing and challenging yourself</p>
<p>Nurturance Assisting others in need or hardship and being of service to others</p>	<p>Independence To be self-sufficient and free from dependence on others</p>	<p>Competence Commitment to being adequately or well qualified physically and intellectually</p>
<p>Family To have a happy, loving family</p>	<p>Teamwork Working with others to achieve a goal</p>	<p>Helpfulness Desire to aid and assist others</p>
<p>Creativity Imagination, inspiration and to have new and original ideas</p>	<p>Education Pursuing intellectual endeavors and gaining knowledge</p>	<p>Intimacy Maintaining close and deep relationships</p>
<p>Ethics Moral standards and principles of conduct</p>	<p>Excellence Achievement of quality and to be competent in my everyday activities</p>	<p>Lifetime Learning Formal and informal learning opportunities for continuous development and knowledge</p>
<p>Justice To promote fair and equal treatment for every individual</p>	<p>Friendship To have a network of close and supportive friends</p>	<p>Knowledge To learn and contribute valuable knowledge</p>
<p>Meaningful Activity The importance of pursuits that have purpose and lasting value</p>	<p>Adventure Participation in new and exciting experiences</p>	<p>Leisure Taking time to relax and enjoy life</p>
<p>Security The safety and comfort that comes from protection and certainty</p>	<p>Solitude Tranquility and peace and time to be apart from others</p>	<p>Environment Valuing nature and the need to care for and live in harmony with our planet</p>
<p>Decisiveness The ability to make firm and definitive decisions that provide clear direction</p>	<p>Spirituality Desire to understand one's inner soul and relationship with the world</p>	<p>Order To have a life that stays fairly consistent, well-ordered, and organized</p>
<p>Faith Devotion and dedication to a set of beliefs</p>	<p>Truthfulness Honesty, integrity and being forthright</p>	<p>Care Prudent approaches in all actions</p>
<p>Work Fulfillment of a duty to achieve a purpose</p>	<p>Recognition Being acknowledged and appreciated</p>	<p>Popularity To be well liked by many people</p>
<p>Loyalty Faithful commitment to people and ideals</p>	<p>Respect Ability to demonstrate admiration and esteem towards others</p>	<p>Courage Perseverance and bravery and the ability to face difficulties</p>
<p>Leadership The ability to motivate others towards the achievement of a goal</p>	<p>Wealth Security and freedom provided by accumulating assets</p>	<p>Giving Making monetary or time donations to benefit others</p>
<p>Privacy Free from intrusion and the right to confidentiality</p>	<p>Variety Embracing unpredictability in life, and the challenges and opportunities that change provides</p>	<p>Other If you don't see a value listed, feel free to come up with your own</p>

Discovery Practice (Decision 3): Values



Discover Your Values Exercise

Select Your Top 15

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

Select Your Top 10

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

Select Your Top 5

1. _____
2. _____
3. _____
4. _____
5. _____

Share an example of how these values show up in your life.

<u>Value</u>	<u>Example</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Fill out Goal Detail Worksheets for each of the TOP 3 Goals.

Goal Detail Worksheet™ (GISOR) - Goal 1

Re-write the goal to ensure it's exact and then answer the questions below.

Include in Planning Map™

Goal:

Why is this goal **Important** to accomplish? Be specific.

What **Supporting Resources** will assist in accomplishing this goal?

What **Obstacles** may prevent this goal from being accomplished?

Readiness: Where are you on a scale from 1 to 5?
1 being **Ready** to take action and 5 not being ready to take action.

1 2 3 4 5

Goal Detail Worksheet™ (GISOR) - Goal 2

Re-write the goal to ensure it's exact and then answer the questions below.

Include in Planning Map™

Goal:

Why is this goal **Important** to accomplish? Be specific.

What **Supporting Resources** will assist in accomplishing this goal?

What **Obstacles** may prevent this goal from being accomplished?

Readiness: Where are you on a scale from 1 to 5?
1 being **Ready** to take action and 5 not being ready to take action.

1 2 3 4 5

Goal Detail Worksheet™ (GISOR) - Goal 3

Re-write the goal to ensure it's exact and then answer the questions below.

Include in Planning Map™

Goal:

Why is this goal **Important** to accomplish? Be specific.

What **Supporting Resources** will assist in accomplishing this goal?

What **Obstacles** may prevent this goal from being accomplished?

Readiness: Where are you on a scale from 1 to 5?
1 being **Ready** to take action and 5 not being ready to take action.

1 2 3 4 5

Fill out the following worksheet by taking the goals and adding a timeframe for completion for each. Indicate the status of each goal.

The Planning Map™

Goal Name: (from Goal Detail Worksheet) _____

Begin Period: ____ / ____ / ____ End Period: ____ / ____ / ____

Status: Completed In Progress Scheduled
Deleted Rescheduled Tentative

Note: _____

Goal Name: (from Goal Detail Worksheet) _____

Begin Period: ____ / ____ / ____ End Period: ____ / ____ / ____

Status: Completed In Progress Scheduled
Deleted Rescheduled Tentative

Note: _____

Goal Name: (from Goal Detail Worksheet) _____

Begin Period: ____ / ____ / ____ End Period: ____ / ____ / ____

Status: Completed In Progress Scheduled
Deleted Rescheduled Tentative

Note: _____

Creating a Deliverable

Now that you've completed the worksheets, the most important piece is to create a client deliverable. If you're a Planning Associate or team member, take the content documented and add yourself as a client in the Qualitate application to create your plan. If you're an advisor, have your Planning Associate or team member input your case into the application to produce your deliverable.

Please sign below that you commit to integrating what you have learned.

Signed: _____

Dated: _____