

Your Walkaway Passport™

Name: _____

Date: _____

Your Walkaway Passport™ focuses on increasing resources in all different areas of life. Please read the criteria to the right of each mindset and (1) write in the box labeled "Your Score Now" the number that best represents where you are now and (2) write in the box labeled "Your Goal Score" the number that best represents where you WANT to be.

	1	2	3	4	5	6	7	8	9	10	11	12	Your Score Now	Your Goal Score
1 Readiness Mindset You haven't been able to establish an adequate emergency fund for unexpected expenses.				You have an emergency fund that would cover one month or less of living expenses.				You have an emergency fund that would cover 1-3 months of living expenses.				You have an emergency fund that would cover at least 3-6 months of living expenses.	<input type="text"/>	<input type="text"/>
2 Wellness Mindset You really don't find much time to focus on healthy habits, such as exercising or watching what you eat.				You focus on healthy habits somewhat, but you have trouble doing so consistently.				You're doing well with healthy habits, but you also recognize that you could do better.				You focus heavily on healthy habits, with the goal of living and working energetically beyond conventional expectations.	<input type="text"/>	<input type="text"/>
3 Foundation Mindset You haven't been able to get any of these five key protections in place (Life, Long-Term Care or Disability Insurance; Emergency Fund; Wills/Trusts).				You have 1-2 of these five key protections in place.				You have 2-3 of these five key protections in place.				You have 4-5 of these key protections in place.	<input type="text"/>	<input type="text"/>
4 Longevity Mindset You really don't have a plan in place for long-term care, if you were no longer able to care for yourself.				You haven't done anything formal, but you think you could rely on family or friends to care for you.				You've made some financial provisions for long-term care, but you're not sure they're adequate.				You have long-term care insurance or a fund that is sufficient to ensure you can be self-reliant.	<input type="text"/>	<input type="text"/>
5 Caring Mindset It would be virtually impossible for your family to find and access all the documents (bank accounts, investment accounts, legal documents, etc.) they would need if you weren't around.				Your loved ones could find and access only a few of these items.				Your loved ones could find and access most of these items.				Your loved ones could find and access virtually all of these items AND you've gone over everything with a loved one.	<input type="text"/>	<input type="text"/>
6 Income Mindset You haven't really thought about a plan for income after you walk away from your current career or business.				You've thought about this issue but you don't have a clear plan in place.				You have a plan in place but you're not sure it would provide sufficient income through your lifetime.				You have a concrete plan for providing more than enough income to last through your lifetime.	<input type="text"/>	<input type="text"/>
7 Purpose Mindset Either you haven't thought about your purpose for your "next chapter," after you walk away from your current career or business, or you don't see the need.				You've thought about it somewhat, but you don't have a clear sense of your purpose.				You have a pretty good idea of your purpose for your next chapter, but you haven't developed a clear plan.				You have a purpose-driven vision and plan for your next chapter.	<input type="text"/>	<input type="text"/>
8 Partnership Mindset You don't currently work with a financial advisor.				You have a financial advisor but you really manage your finances yourself.				You have a financial advisor whose advice you appreciate but you don't always feel he or she is on your side.				You have a financial advisor and because you know he or she has your best interest at heart, you work together in partnership.	<input type="text"/>	<input type="text"/>

Your Total Score Now

Your Total Goal Score

Distance from Your Goal

Your Total Goal Score – Your Total Score Now =