

WORKSHEET

Personal Impact Summary

This worksheet is a space for you to gather all of the guiding principles you have crafted using the Road Map to align your wealth to your values. Duplicate all pages of this worksheet for your own purposes.

Instructions

1. List Your Values

Reference your personalized [Core Values Worksheet](#) to list the values statements that guide your individual action commitment.

Values Statements 1. 2. 3. 4. 5.
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2. List Your Priorities, Impact Areas and Impact Statement for Your Wealth

Reference your personalized [Wealth Priorities & Impact Statement Worksheet](#) to list the priorities for your wealth.

Priorities

Impact Areas

Impact Statement

3. List Your Investment Objectives

Reference your personalized [Investment Policy Statement Worksheet](#) to list your investment objectives.

Investment Objectives
