



# FINANCIAL HOPE™

*Steward Today, Impact Forever*

Equipping Individuals To Budget  
Like A Business For Their Personal Finances

Set Direction - Establish Your Mission

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## Establish Your Mission

When setting the direction of your financial future, the first step is to identify your ideal future. In order to do this, it's important to get your brain moving in the right direction, and thinking at a high level about your life.

In this section, we'll ask questions that may not seem directly related to finances. Some of these will touch on your family life or the future you want to avoid. When answering, allow yourself to think deeply, not just about what others might want for you, but about what is truly at your core.

The point of this exercise is to uncover the direction you want to be heading and to answer:

**“Where do you want to be?”**

and

**“What future do you want to avoid?”**

If you're doing this exercise with a spouse, it's important to realize how dynamics can play a role in the process. Sometimes, a significant other may hesitate to share what they truly want for various reasons:

- They may fear your reaction.
- They may worry you'll dismiss their ideas.

If you want to get real value out of this discussion, focus on **listening to understand**. Avoid reacting too quickly or critically. Instead, work to understand your partners vision for the future.

Fill this section out independently and then compare notes. It's likely that each of you will answer this section differently and that's okay.

Together, you will combine both of your ideal futures to set a direction that balances and maximizes the goals of both partners.

**There will be time to organize and prioritize your mission in a later chapter. We don't recommend trying to do that now, or shoot down goals yet, as it can stifle conversation and diminish the value you could gain from this section.**

We're not yet ready to delve into each partner's frame of thought, but we'll get there. For now, be patient and listen to one another.

By taking the time to reflect, communicate openly, and set clear objectives together, you will establish a strong foundation for a purposeful financial journey that positivity impacts everyone involved.

Lets Start with Some Simple Questions ....

What work brings you joy?

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Where do you want to live?

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How do you spend your leisure time?

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Where do want your kids to go to school?

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If you could choose only one thing that you could do better, what would it be?

What habits would you like to improve? Why?

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People often waste free time on easy but unproductive activities like watching TV, which can add up to a significant loss of time and money over the years. Consider what worthwhile and meaningful activities that you truly enjoy.

**How would you plan your leisure time to be genuinely productive and enjoyable?**

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A peaceful and happy family life can make you feel like you belong and can help you reach your goals. Think about what your ideal family would look like—this could include your parents, siblings, a partner, or children. (if relevant) What kind of partner would be good for you? How can you make your relationships with your family better?

**What is your ideal family life, and how can you improve your relationships with your loved ones?**

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Many people find enjoyment in their careers. A good career offers security, respect, interest, and a way to help the community. Think about your school or work life, or both. Where do you want to be in six months? Two years? Five years? Why? What do you want to achieve?

**What are your goals for the next six months, two years, and five years in your education or career, and why are they important to you?**

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