



LIFECHECK WORKSHEET – MONTHLY/WEEKLY

Walk through each section below in order. Spend more time where you need it most.

Review

LIFE STUFF

- Calendar, school, and family obligations

- Upcoming travel or events

- Anything pulling attention right now

CHALLENGES

- What challenges threaten our pursuits?

- What's been hard lately?

- What do we need help with?

CELEBRATIONS & MOMENTS

- Ebenezers and milestone wins

- Wins that build family culture

- Kids' milestones to recognize

ACTION ITEMS

- What do we need to do before next check-in?

- Who owns each item?

- What's the due date?



LIFECHECK WORKSHEET – QUARTERLY

Walk through each section below in order. Spend more time where you need it most.

Review

MISSION & CORE VALUES

- Are we living out our mission right now?

- Where did our values show up this quarter?

- Any decisions that need values alignment?

LIFE STUFF

- Calendar, school, and family obligations

- Upcoming travel or events

- Anything pulling attention right now

LIFE PURSUITS & MILE MARKERS

- Progress on our mile markers?

- Anything blocking momentum?

CELEBRATIONS & MOMENTS

- Ebenezers and milestone wins

- Wins that build family culture

- Kids' milestones to recognize

CHALLENGES

- What challenges threaten our pursuits?

- What's been hard lately?

- What do we need help with?

ACTION ITEMS

- What do we need to do before next check-in?

- Who owns each item?

- What's the due date?

CHECK IN ON FINANCES

- Distributions or income expected?

- Big expenses on the horizon?

- Quarterly estimated tax payments due?

- House or property expenses?

- Giving opportunities?

RELATIONSHIPS

- How are we doing as a couple?

- What is going on for each of our kids?
