

Net Life Review (NLR) Worksheet

Reflect. Refocus. Recommit.

1. Net Worth Check-In (Financial Health)

- Jan portfolio balance: _____, Current Balance _____
- Spending compared to the budget plan:
 - On track
 - Over budget
 - Under budget
- Investment performance:
 - What worked: _____
 - What didn't: _____
- Adjustments (if any): _____

2. Net Life Check-In (Life Satisfaction)

Rate each area from 1 (needs attention) to 5 (thriving):

Area	Rating (1–5)	Notes
Time Freedom		
Health & Wellbeing		
Relationships		
Purpose/Meaning		
Fun & Adventure		

What made you feel most alive last year? _____

What felt missing? _____

3. Lessons & Adjustments (Start / Stop / Continue)

- One change I will make (*Start*): _____
- What I want to do less of (*Stop*): _____
- What I want to do more of (*Continue*): _____

4. Gratitude & Perspective

- I'm proud of: _____
- I'm grateful for: _____

5. Reflections

- Something I worried about that didn't matter much: _____
- Something that mattered more than I expected: _____
- If I could go back in time, a message I would give my January self:

- Going forward in time, what I would like to tell future me*:

*Suggestion: Enter a note to your future self on the calendar this day one year from now