Assessing Your Life Balance

“A wheel runs most smoothly when well balanced.”

**Instructions:**

Read each statement and fill in the corresponding pie shaped section of the wheel to the degree you are achieving this. For example, question one is: " I eat a balanced nutritional diet"; if you feel you are doing this 100%, of the time, color in all of section one. If you feel you do this, 60% of the time, color 60% of the section. Repeat for all 36 sections of the wheel.

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34

35

36

**100**

**%**

**50**

**PHYSICAL**

**(**

**orange**

**)**

**SPIRITUAL**

**)**

**blue**

**(**

**SOCIAL**

**)**

**green**

**(**

**EMOTIONAL**

**(**

**red**

**)**

**INTELLECTUAL**

**(**

**purple**

**)**

**FINANCIAL**

**)**

**(**

**yellow**

From R. Robertson & G. Microys, *Life Balance Assessment and Action Planning Guide, 2001-2* and Lutheran Social Services of Michigan, *Your Guide to the Wellness Wheel*.

Sections & Statements

# Physical: Orange

1. I eat a balanced, nutritional diet.
2. I exercise at least three times a week.
3. I take responsibility for my physical health.
4. I am generally free from illness.
5. I have annual check-ups and specific medical checks as prescribed.
6. If at all, I use tobacco, alcohol, or prescribed drugs responsibly and moderately.

# Financial: Yellow

1. I live within my means and take responsibility for my financial decisions.
2. My spending and saving habits reflect my values and beliefs.
3. I actively plan for periods in my life when I may not have income.
4. I pay bills on time and positively manage credit.
5. I balance present-day spending with saving for the future.
6. I have similar financial beliefs and practices as those with whom I am close.

# Intellectual: Purple

1. I enjoy learning new skills and information.
2. I have positive thoughts (low degree of negativity & cynicism).
3. I am generally satisfied with my vocation/major.
4. I commit time and energy to professional growth and self-development.
5. My work is stimulating, rewarding, and reflects my values.
6. I pursue mentally stimulating interests and hobbies.

# Emotional: Red

1. I have a sense of control in my life and am able to adapt to change.
2. I perceive “problems” as opportunities for growth.
3. I am able to comfort or console myself when I am troubled.
4. I have a sense of fun and can laugh at myself.
5. Others would describe me as emotionally stable.
6. I believe I am responsible for my feelings and how I express them.

# Social: Green

1. I have at least three people with whom I have a close, trusting relationship.
2. I am able to resolve conflicts in all areas of my life.
3. I have satisfying social interactions with others.
4. I am aware and able to set and respect my own and others’ boundaries.
5. I am aware of the feelings of others and can respond appropriately.
6. I have a sense of belonging to a group or within organizations.

# Spiritual: Blue

1. I have a sense of meaning and purpose in my life.
2. I have a general sense of serenity.
3. I am happy with the beliefs I hold.
4. I practice prayer, meditation, or engage in some type of reflective growth.
5. Principles/ethics/morals provide guides for my life.
6. I trust others and am able to forgive others and myself.

Your Plan

**Remember:**

Each person is unique.

There is no “right” or “wrong” wheel.

Responses will vary depending on age and stage of life.

Consider the wheel you have created as a source of feedback. Feedback is something we can choose to use or ignore.

**Reflection:**

Which section(s) has the most color? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Which section(s) has the least color? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What do you like about your wheel?

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What would you like to change?

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Where could you make investments (time, energy, money) to bring more color to your wheel?

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Other insights or reflections:

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**Setting Goals:**

As a result of this assessment, I intend to improve my life balance by:

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My first step will be:

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I will share my plans with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and ask for support by saying

“\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.”

I will review my progress on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. (date)