



Craft Your Vision Statement And Define Your Core Values

Take a moment and consider: When you think about what you want for your life now and going forward, what comes to mind?

Depending at what phase of your life you are in right now, the answer will be quite different.

Do you want to have the energy to start up your career or a new one, or do you want to have children or have the energy to play with your kids or grandkids? As you are aging, do you want to feel strong enough to keep doing all the activities you love? Maybe you just want to fit into your favourite clothes? Or do you picture yourself traveling the world and enjoying different cuisines? Or volunteering your time to make the world a better place? The choices are endless!

It's exciting to think about, right?

In this worksheet, you'll imagine and define exactly what you want for yourself and your life so you can develop your very own Future Vision that will help you then create your Natural Balance Guide.

Creating a Vision Statement is a simple but powerful way to get really clear on what you want out of life. Basically, it acts like your north star. As you work with your coach (or independently) on nutrition, exercise, lifestyle, and mindset, and more, you can prioritize the strategies that align with this vision and cultivate a personalized roadmap for success.

We recommend giving yourself at least 10–15 minutes to work through this worksheet, though if you've never done a values exercise, you may want to allow yourself some extra time to really think through your answers — do what works for you.

So without further ado, let's dive in!

Step #1: Discover Your Values

Let's get introspective — This is the moment to look inside and get clear on who you are, who you want to be, and what's most important to you at this phase of your life.

A great way to do this is to answer this question: What are your core values when it comes to what you want for your life?

That's not always an easy question to answer. Often, as the years go by, we forget to check in with ourselves. We get so focused on caring for other people or just keeping up with life that we don't necessarily check in and think about what **we** really need and want.

Take a moment to think about the things you value most when looking at the 12 areas of living a natural balance lifestyle. What means the most to you? How do you want to show up in your life, regardless of the outcome?

If you need a little more guidance, consider the following prompts for each area:

- **When you think about your *nutrition and hydration*, which values do you most strongly identify with?**

For example, maybe when you think of nutrition, you think of **connection** and **culture** because you love cooking foods that are connected with your heritage and using them to bring loved ones together. Or, maybe you think of **ease**, you are so busy with everything else that you want nutrition to be as easy as possible.

- **When you think about *exercise and moving your body*, which values do you most strongly identify with?**

For example, maybe you value **strength**. If you took care of your mom as she got older and watched her slowly lose strength and independence, then maybe being strong and capable is most important to you. Or, maybe you value **efficiency**. Perhaps you don't love exercise, but you know it's important so you want to figure out the minimum effective dose you need to stay healthy so you can fill your time with other things.

- **When you think about your *self purpose*, which values do you most strongly identify with?**

Maybe you value **service**. You need to get enough good sleep and fuel your body with healthful foods because you want to wake up each day with plenty of energy to spend in service to others. Or, maybe you love **adventure**. You want to make sure you can get outside, summit peaks, and chase your friends through the forest on your mountain bike. To go on huge adventures, you'll need consistent exercise and movement habits to keep you fit, and healthy nutrition to get the energy you need to perform and recover.

- **When you think about your *inner stillness*, which values do you most strongly identify with?**

For example, maybe you think of **peace** and **harmony** because you know how unhappy the conflict in your previous marriage made you feel. You want to practice meditation and other mindset strategies to keep your soul feeling as centered as your body. Or, maybe you want to lean into **kindness**. You're a compassionate human, but maybe you've realized that even though you're kind to everyone else, you might need to practice being a little kinder to yourself.

- **When you think about *self care and sleep* which values do you most strongly identify with?**

For example, perhaps you value **restoration** and **balance**. You understand the importance of quality sleep and self-care routines to replenish your energy and maintain harmony in your life. Or maybe you value **consistency**. You strive to establish a regular sleep schedule and self-care habits that provide a stable foundation for your daily activities and overall well-being.

- **When you think about your *connection to nature*, which values do you most strongly identify with?**

Perhaps you value **wonder** and **serenity**. You might find peace and inspiration in the natural world, whether it's hiking through forests, strolling along a beach, or simply sitting in a quiet garden. These experiences may help you feel grounded and connected, providing a vital counterbalance to the hustle and bustle of daily life. Or maybe you value **sustainability**. You appreciate the importance of preserving the environment and strive to incorporate eco-friendly practices into your lifestyle, aiming to protect the natural beauty around you for future generations.

- **When you think about your *work satisfaction*, which values do you most strongly identify with?**

Perhaps you value **growth** and **creativity**. You might thrive in environments that challenge you to learn new skills and allow you to express your innovative ideas. Or maybe you value **stability** and **teamwork**. You appreciate a reliable work environment where collaboration and mutual support are at the forefront, creating a sense of community and shared success. Understanding these values can help you seek opportunities and roles that align with what truly matters to you in your professional life.

- **When you think about your *money relationship*, which values do you most strongly identify with?**

For instance, you might value **security** and **independence**, aiming to build a financial cushion that allows you to feel safe and make choices freely. Or perhaps you resonate with **generosity**, where your focus is on sharing your resources with others, whether through philanthropy or simply helping out friends and family in times of need. Alternatively, you might value **simplicity** and prefer to manage your finances in a way that aligns with a minimalist lifestyle, reducing stress and focusing on what truly matters to you. Recognizing these values can guide your financial decisions and help you create a money management strategy that supports your overall life vision.

- **When you think about all your relationships: love, family, friends which values do you most strongly identify with?**

The point is to get you thinking: What resonates deeply with you, and how can you make decisions that align with these deepest beliefs?

This is important because as you create new habits around your nutrition, fitness, lifestyle etc, these practices should *add* to your life in the moment. They shouldn't be something you white-knuckle your way through in the hopes of achieving a desired outcome. Deciding what practices to tackle by filtering them through your values will not only make your journey more enjoyable but also make these behaviors more sustainable over time.

With that in mind, read this list of values and select the 10 words that resonate with you the most. (If you think of a word you don't see here, feel free to add it!)

List of Values

- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> Accomplishment | <input type="checkbox"/> Enthusiasm | <input type="checkbox"/> Optimism |
| <input type="checkbox"/> Accountability | <input type="checkbox"/> Equity | <input type="checkbox"/> Order |
| <input type="checkbox"/> Achievement | <input type="checkbox"/> Excellence | <input type="checkbox"/> Passion |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Experience | <input type="checkbox"/> Patience |
| <input type="checkbox"/> Altruism | <input type="checkbox"/> Faith | <input type="checkbox"/> Performance |
| <input type="checkbox"/> Ambition | <input type="checkbox"/> Family | <input type="checkbox"/> Persistence |
| <input type="checkbox"/> Authenticity | <input type="checkbox"/> Fearlessness | <input type="checkbox"/> Playfulness |
| <input type="checkbox"/> Autonomy | <input type="checkbox"/> Flexibility | <input type="checkbox"/> Power |
| <input type="checkbox"/> Balance | <input type="checkbox"/> Freedom | <input type="checkbox"/> Productivity |
| <input type="checkbox"/> Beauty | <input type="checkbox"/> Friendship | <input type="checkbox"/> Purpose |
| <input type="checkbox"/> Commitment | <input type="checkbox"/> Fun | <input type="checkbox"/> Resilience |
| <input type="checkbox"/> Community | <input type="checkbox"/> Generosity | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Competence | <input type="checkbox"/> Gratitude | <input type="checkbox"/> Security |
| <input type="checkbox"/> Confidence | <input type="checkbox"/> Greatness | <input type="checkbox"/> Self-Actualization |
| <input type="checkbox"/> Connection | <input type="checkbox"/> Grit | <input type="checkbox"/> Self-Reliance |
| <input type="checkbox"/> Consistency | <input type="checkbox"/> Growth | <input type="checkbox"/> Stability |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Happiness | <input type="checkbox"/> Strength |
| <input type="checkbox"/> Dedication | <input type="checkbox"/> Independence | <input type="checkbox"/> Structure |
| <input type="checkbox"/> Determination | <input type="checkbox"/> Innovative | <input type="checkbox"/> Success |
| <input type="checkbox"/> Discipline | <input type="checkbox"/> Integrity | <input type="checkbox"/> Sustainability |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Joy | <input type="checkbox"/> Teamwork |
| <input type="checkbox"/> Ease | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Time |
| <input type="checkbox"/> Efficiency | <input type="checkbox"/> Leadership | <input type="checkbox"/> Truth |
| <input type="checkbox"/> Empowerment | <input type="checkbox"/> Mastery | <input type="checkbox"/> Usefulness |
| <input type="checkbox"/> Endurance | <input type="checkbox"/> Motivation | <input type="checkbox"/> Vitality |
| <input type="checkbox"/> Enjoyment | <input type="checkbox"/> Openness | <input type="checkbox"/> Other: |

Once you have your top 10 values, narrow that list down to your top 5. Then, narrow those 5 down to your top 3 (in order of importance).

Top 10 Values:	Top 5 Values:	Top 3 Values:
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	
5.	5.	
6.		
7.		
8.		
9.		
10.		

(Note: When you narrow down the list to your top 3, you aren't getting rid of the other values that are important to you. Rather, you're getting super clear on what's at the top of the list. This way, if you need to make a decision that involves competing values, you'll know your priorities and can make your decision more easily.)

Great work! You've just defined your top 3 values. These will guide the rest of your work here.

Step #2: Determine Your Big Rocks

Now that you've nailed down your top values, let's identify the "big rocks" in your life.

Let us explain. Imagine your time as a jar that you can fill with a finite amount of rocks, pebbles, and sand.

In life, the big rocks represent your top priorities, the things that make the biggest difference to help you feel most fulfilled. The pebbles are things you enjoy that bring satisfaction to you but aren't totally necessary for you to live a good life. And the sand simply represents bonus activities: Fun stuff that isn't essential to your fulfillment or survival.

As the analogy goes, if you fill up your jar with sand first, it will be impossible to get the pebbles or big rocks in the jar. So you want to make sure you're putting in your big rocks first.

Your big rocks might be related to family, friends, service, career, sleep, health, religion, or a whole bunch of other things. And once you know your big rocks in life, when combined with your values, they can help you craft your Vision Statement.

Spend a moment thinking about your life and the people, activities, characteristics, and things that you want to prioritize in your future.

What makes the biggest positive difference in your life? What makes you feel fulfilled? What can't you imagine a life without?

Here are some additional prompts to get you thinking:

- What type of work or leisure activities (e.g., volunteering, playing music, painting, learning languages, traveling, being outdoors) get you most excited?
- What do people count on you for (e.g. support, friendship, mentorship) that you enjoy providing?
- What are the things you're most passionate about?
- Who are the most important people in your life?
- How do you want to spend your time?

Some of these big rocks may be things you're already prioritizing; some may be ones you want to turn your focus to in the future.

Similar to how you discovered your values, start by listing your top 10 big rocks. Then, work on narrowing it down.

Top 10 Big Rocks:	Top 5 Big Rocks:	Top 3 Big Rocks:
1.		
2.		
3.	1.	1.
4.	2.	2.
5.	3.	3.
6.	4.	
7.	5.	
8.		
9.		
10.		

Step #3: Write Your Vision Statement

You’ve officially defined your values and your big rocks! Excellent job getting this far.

Now, it’s time to pull it all together and craft your Vision Statement — a statement that defines what’s most important to you in your life and highlights how you want to spend your time and energy. While it will likely include things you want to specifically prioritize like maybe family, work or health, it might also include things that are a little vaguer but that still contribute to your overall well-being (like spending time outdoors or prioritizing time with friends).

There are several ways you can write this statement, and we provide a couple of sample formulas and examples to kick things off.

Feel free to use any of the formulas as written or start fresh — but we encourage you to keep iterating on your statement until it really feels like an accurate (and inspiring!) snapshot of what your life would look like if you were truly thriving.

You can always adjust this statement as needed. But for now, it will provide a touchstone you can reference as you make progress on creating your natural balance guide and lifestyle.

VISION STATEMENT FORMULAS

Here are some formulas you can use if you need a little help crafting your Vision Statement. All you need to do is customize the pieces in brackets or fill in the blank lines.

Keep in mind: These are just to get you started! You may want to add more or change them up. The second and third examples demonstrate how you might vary a formula to suit your needs.

	Formula	Example
1	In my life, natural balance means: [surrounding myself with these people], [engaging in this activity on a regular basis], and [achieving this goal].	In my life, natural balance means spending as much time as I can with my immediate family, tending to my beautiful garden, and being strong enough to do a push-up.
2	I want to prioritize [big rocks] , spend my time doing [big rocks] with [people] , and live according to my value of [value] by doing [this activity] .	I want to prioritize my family and friends, my health, and service to others. This will look like having home cooked meals with my partner and children, helping care for my aging parents, and organizing charity walks with my friends. All of these activities help me live according to my values of purpose and connection.

	Formula	Example
3	Living in natural balance means I'm [doing this when it comes to nutrition, meals, and cooking] , [doing this activity or sport to stay active and strong] , [doing this to optimize my lifestyle] , and [doing this to enhance my mindset and mental well-being] .	Living in natural balance means I'm experimenting with new meals in the kitchen (and enjoying the outcomes!), hiking up mountains and crushing heavy weights in the gym, practicing meditation on a daily basis for stress reduction, and continuing to see my therapist every other week — and most importantly, I'm not worrying about fitting into my skinny jeans because I'd rather put that mental and physical energy into living according to my value of strength.
4	Because of my values of [top 3] thriving for me means spending this next phase of my life doing [big rocks] and with [important people] , and prioritizing [Action] .	Because of my values of adventure, independence, and joy, thriving for me means spending this next phase of my life traveling and exploring, both by myself and with people I love, and prioritizing rest when I can so I have the energy to do these activities.
5	If I'm thriving and living in natural balance then I feel [emotion] . I spend my time doing [Activities you like] with [people] . I practice [habits] to nourish my body and soul. And I make sure to prioritize [habit] for my health and fitness.	If I'm thriving during menopause, then I feel alive and joyful. I spend my time playing pickleball, going kayaking, and spending time outdoors with friends who lift me up. I practice gratitude to nourish my body and soul. And I make sure to prioritize sleeping enough and eating enough protein for my health and fitness.

WRITE YOUR VISION STATEMENT IN THE SPACE BELOW.

Now, let's do a final check to confirm all the big stuff has made it in there.

Ask yourself the following questions:

- Does this statement align with my top three values?
- Does this statement take my top three big rocks into consideration?
- Does this statement align with how I want to spend my time?
- When I close my eyes and envision living according to this statement, do I feel good? Do I feel joyful, expansive, light, excited, or inspired?

If you can answer a confident "yes" to all of these questions, then fantastic job!

You just crafted your Vision Statement.

You can return to this worksheet again and again for inspiration and to use it as a touchstone to determine what's truly important as you go through this next phase of your life.