

THE ANNUAL PRIORITY AUDIT WORKSHEET

A Comprehensive Guide to Identifying What Matters Most

Set aside 60-90 minutes in a quiet space. Be honest. This is for you.

PART 1: SEASON ASSESSMENT

Question 1: What Season Am I In?

My Professional Season (check one or describe):

- ☐ Foundation/Learning Season (building skills, exploring, establishing career identity)
- ☐ Growth/Building Season (advancing, taking on more responsibility, climbing)
- ☐ Leadership/Influence Season (executive presence, mentoring, strategic impact)
- ☐ Transition Season (pivoting, exploring new directions, making a change)
- ☐ Maintenance/Coasting Season (sustaining current level, not pushing for more)
- ☐ Entrepreneurial Launch Season (0-2 years, testing, validating, establishing)
- ☐ Entrepreneurial Growth Season (2-5 years, scaling, hiring, systematizing)
- ☐ Entrepreneurial Established Season (5+ years, leveraged income, strategic positioning)

Describe your professional season in one sentence:

My Personal/Family Season (check all that apply):

- ☐ Young children (0-5) - need physical presence constantly
- ☐ School-age children (6-12) - need routine and availability
- ☐ Teenagers (13-18) - need strategic presence and flexibility
- ☐ Young adult children (18+) - transitioning to peer relationship
- ☐ Empty nest - redefining identity and priorities
- ☐ Caring for aging parents - managing additional responsibilities
- ☐ Building/repairing primary relationship - focused on partnership
- ☐ Single/dating - exploring relationship possibilities
- ☐ Health challenge - prioritizing recovery and wellbeing
- ☐ Major life transition - moving, divorce, loss, new beginning

Describe your personal/family season in one sentence:

My Energy/Capacity Season: On a scale of 1-10, rate your current energy and capacity:

Physical Energy: _____ / 10

Mental/Emotional Energy: _____ / 10

Bandwidth for New Things: _____ / 10

This tells me: (Am I in a high-energy season where I can take on more? Or a depleted season that calls for rest and simplification?)

My Financial Season (check one):

- ☐ Debt payoff mode (focused on eliminating debt)
- ☐ Wealth building mode (maximizing income and investments)
- ☐ Stability/security mode (building emergency fund, getting to sustainable)
- ☐ Flexibility/freedom mode (have enough, want more time/choice)
- ☐ Giving/legacy mode (established, focused on impact and generosity)

My financial priorities this year:

PART 2: LAST YEAR'S REALITY CHECK

Question 2: What Were My ACTUAL Top 3 Priorities Last Year?

Look at your calendar and bank statements. Where did your time and money actually go?

Time Analysis: Review your calendar from last year. On average per week:

- Work/Career: _____ hours
- Kids' activities/presence: _____ hours
- Partnership/relationship: _____ hours
- Exercise/health: _____ hours
- Friends/community: _____ hours
- Personal projects/creativity: _____ hours
- Volunteering/service: _____ hours

- Household management: _____ hours
- Rest/doing nothing: _____ hours

Money Analysis: Review your spending from last year. **Include everything—housing, food, all of it.**

Unintentional priorities like eating out, oversized homes, or lifestyle inflation often take over silently. We don't realize we're working to fund habits we didn't consciously choose. This exercise reveals what you're actually prioritizing through your spending.

Monthly spending breakdown:

- Housing (mortgage/rent, utilities, maintenance): \$ _____
- Food (groceries + eating out): \$ _____
 - *Of this, eating out is approximately:* \$ _____
- Transportation (car payments, gas, insurance, maintenance): \$ _____
- Kids (activities, school, clothes, supplies): \$ _____
- Healthcare (insurance, copays, prescriptions): \$ _____
- Debt payments: \$ _____
- Lifestyle/discretionary (shopping, entertainment, hobbies): \$ _____
- Subscriptions (streaming, apps, memberships): \$ _____
- Travel/vacations: \$ _____ (annual ÷ 12)
- Other: \$ _____

TOTAL MONTHLY: \$ _____

Surprises or revelations from this analysis:

Areas where I'm spending more than I realized or more than aligns with what I say matters:

Now, step back and look at the full picture of where your time AND money went.

Based on where my time and money actually went, my top 3 priorities last year were:

1. _____
2. _____
3. _____

Was I aware these were my priorities? Or am I surprised?

Examples of what this might reveal:

- "I said family was my priority, but I worked 60 hours/week and spent \$800/month eating out because I was never home to cook."
 - "I thought career growth was my priority, but I actually spent more time and money on my side business—maybe that's telling me something."
 - "I believed health mattered, but I spent \$0 on health related items while spending \$500/month on convenience and stress eating."
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PART 3: THE EMOTIONAL CHECK-IN

How Did Last Year's Priorities Actually FEEL?

Before we assess alignment, let's get honest about how living those priorities felt.

When I think about last year, I felt: (check all that apply)

- ☐ Fulfilled and purposeful
- ☐ Exhausted and drained
- ☐ Resentful or bitter
- ☐ Proud of what I accomplished
- ☐ Disappointed in myself
- ☐ Disconnected from what matters
- ☐ Aligned with my values
- ☐ Like I was running on autopilot
- ☐ Guilty about what I was missing
- ☐ Peaceful and content
- ☐ Anxious or overwhelmed
- ☐ Energized and alive

The areas where I felt most fulfilled:

Why those areas felt good:

The areas where I felt most drained, resentful, or misaligned:

Why those areas felt bad:

What I was doing that filled me up:

What I was doing that depleted me:

If I'm honest, what I was missing most:

PART 4: THIS YEAR'S PRIORITIES

Question 3: What Do I Want My Top 3 Priorities to Be THIS YEAR?

Given your current season and how last year felt, what matters most right now?

Consider these life domains:

- Career advancement/development
- Entrepreneurial growth/business building
- Family presence/time with children
- Partnership/marriage
- Extended family/aging parents
- Physical health/fitness
- Mental/emotional health
- Friendships/community
- Creative pursuits/passion projects
- Financial goals (debt payoff, wealth building, etc.)
- Learning/personal development
- Service/volunteering/giving back
- Rest/recovery/slowing down
- Spiritual growth/practices
- Home/living environment

My Top 3 Priorities for This Year:

Priority #1: _____

Why this matters most right now:

How I want to FEEL when I'm honoring this priority:

What success looks like (specific, measurable):

Non-negotiables to protect this priority:

The emotions I'm avoiding by NOT prioritizing this: (guilt, regret, resentment, disconnection, etc.)

Priority #2: _____

Why this matters most right now:

How I want to FEEL when I'm honoring this priority:

What success looks like (specific, measurable):

Non-negotiables to protect this priority:

The emotions I'm avoiding by NOT prioritizing this: (guilt, regret, resentment, disconnection, etc.)

Priority #3: _____

Why this matters most right now:

How I want to FEEL when I'm honoring this priority:

What success looks like (specific, measurable):

Non-negotiables to protect this priority:

The emotions I'm avoiding by NOT prioritizing this: (guilt, regret, resentment, disconnection, etc.)

When I imagine living aligned with these three priorities, I feel:

The life I'm creating by honoring these priorities:

PART 5: THE CHANGE PLAN

Question 4: What Needs to Change to Honor These Priorities?

WORK/CAREER AUDIT

Current commitments, projects, or responsibilities that DON'T support my priorities:

What I need to:

- **Stop doing:** _____
- **Start doing:** _____
- **Do differently:** _____
- **Delegate:** _____
- **Reduce frequency/time on:** _____

Conversations I need to have at work:

HOME/FAMILY AUDIT

Current activities or commitments that don't support my priorities:

Kids' activities to evaluate:

- [] _____ - Keep? Reduce? Drop? Add?
- [] _____ - Keep? Reduce? Drop? Add?
- [] _____ - Keep? Reduce? Drop? Add?
- [] _____ - Keep? Reduce? Drop? Add?

Household responsibilities to delegate, simplify, or eliminate:

Conversations I need to have at home:

RELATIONSHIPS AUDIT

Friendships/relationships that energize me and support my priorities:

Friendships/relationships that drain me or don't align:

Where I'm over-giving out of guilt, obligation, or habit:

Boundaries I need to set:

VOLUNTEER/COMMUNITY AUDIT

Current commitments:

- [] _____ - Continue? Complete term? Exit? Begin?
- [] _____ - Continue? Complete term? Exit? Begin?
- [] _____ - Continue? Complete term? Exit? Begin?

Roles I need to step down from:

How I'll exit gracefully:

CALENDAR AUDIT

Recurring meetings/commitments to eliminate or reduce or add:

Time blocks I need to protect for my priorities:

Priority #1 needs: _____ hours/week, scheduled on: _____

Priority #2 needs: _____ hours/week, scheduled on: _____

Priority #3 needs: _____ hours/week, scheduled on: _____

What currently fills those time slots that needs to go:

FINANCIAL AUDIT

Current spending that doesn't serve my priorities:

Housing: Is my home size/cost aligned with my current season and priorities?

Food/Eating Out: Am I spending intentionally here, or is this an "unintentional priority"?

Other areas of unintentional spending:

Where I can redirect money to better align with priorities:

I could reduce spending on: _____ (\$ _____ /month)

And redirect that toward: _____ (Supporting priority # _____)

I could reduce spending on: _____ (\$ _____ /month)

And redirect that toward: _____ (Supporting priority # _____)

Financial decisions I need to make to support my priorities:

EXTRACURRICULAR/ACTIVITIES AUDIT

My activities:

- [] _____ - Energizing or draining? Keep or drop?
- [] _____ - Energizing or draining? Keep or drop?
- [] _____ - Energizing or draining? Keep or drop?

Kids' activities:

- [] _____ - Their genuine passion or my expectation?
- [] _____ - Their genuine passion or my expectation?
- [] _____ - Their genuine passion or my expectation?

Social commitments to reduce or eliminate:

PART 6: ACTION PLAN

The Changes I'm Committing to This Quarter

By end of this month, I will:

1. _____
2. _____
3. _____

By end of this quarter, I will:

1. _____
2. _____
3. _____

The hardest change to make will be:

Why it's hard:

Why it's worth it (the feeling I'm moving toward):

My Non-Negotiables This Year

No matter what, I will not compromise on:

1.

2.

3.

When I'm tempted to say yes to something that doesn't serve my priorities, I will remind myself:

PART 7: THE TRADE PREPARATION

Part 2 of this series will focus on what you're willing to trade for what you want most. Start thinking about it now.

Looking at my new priorities, I may need to trade or reduce:

I may need to give up or reduce:

To make room for:

I may need to give up or reduce:

To make room for:

I may need to give up or reduce:

To make room for: _____

The trades I'm most afraid of making:

What I'm afraid people will think:

What I know is true anyway:

QUARTERLY CHECK-IN

Revisit this audit every 3 months

Q1 Check-In (March)

How am I doing on my top 3 priorities? What needs adjustment?

Q2 Check-In (June)

How am I doing on my top 3 priorities? What needs adjustment?

Q3 Check-In (September)

How am I doing on my top 3 priorities? What needs adjustment?

Q4 Check-In (December)

How am I doing on my top 3 priorities? What needs adjustment?

FINAL REFLECTION

My word/theme for this year:

The feeling I plan for this year to bring:

The feeling I'm done tolerating:

When I honor this year's priorities, my life will be:

The emotions I want to experience more of:

The emotions I want to experience less of:

One year from now, I want to look back and know:

One year from now, I want to look back and say:

What honoring my priorities will give me that I don't have now:

What dishonoring my priorities will cost me:

Remember: Priorities change with seasons. This isn't forever—it's for now. Honor where you are.