

# Personal Mission Statement Worksheet

This worksheet is designed to help you craft a Personal Mission Statement. A good mission statement can function as your guiding light for making decisions, not just in retirement but also in life. Mission statements are often confused with vision statements. The two are complimentary, yet dissimilar.

Here's the main difference. Your Personal Mission Statement should reflect the *present tense*. It should convey what you are currently doing or plan to do in the immediate future and who or what will benefit from your mission or activities, whereas your Personal Vision Statement is *future oriented* and describes a scenario, circumstance or a world as you envision it or would like it to be.

There are several ways to go about crafting your Personal Mission Statement. This is only one approach. The process generally requires some deep thought and self-reflection. Set some quality time aside for this. Let's get started.

**Step 1:** List the 3 past accomplishments or successes you are most proud of.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Step 2:** List the 3 core values most important to you. (Refer to the Core Values worksheet included in your Retirement Toolkit.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Personal Mission Statement Worksheet

**Step 3:** List 3 of your most significant contributions (to your family, friends, church, profession, community or the world.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Step 4:** List 3 important goals you still want to accomplish.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Step 5:** Use your answers to develop your Personal Mission Statement. Circle or put a checkmark by your most important accomplishment, core value, contribution and goal since fewer key words will make it easier to craft your Personal Mission Statement. Keep in mind that your Personal Mission Statement should be brief and succinct. It is perfectly acceptable to periodically modify your Personal Mission Statement as circumstances change. It is likely that you will have to draft, rewrite, edit and re-edit your Personal Mission Statement several times before you settle on a final version that speaks to you.

As I noted above, it is best to set aside some quiet time for this exercise. It may be helpful to reflect on the questions below while you work on this exercise.

- What is it that I want from the rest of my life?
- What is it that I really value in life?
- What do I excel at? (Look at the results of your SWOT analysis.)
- What am I most proud of?

