

## PART 3

### The Personal Journey Milestones

Before embarking on your Personal Journey, take a few moments to review this checklist to mark the applicable status box for each milestone. For those milestones you mark "Finished," it is worth considering whether you would like to revise or update your previous work as you review it within the context of the process outlined here. Please note that the milestones in this section are designed to build on one another, so it will be most beneficial to follow them sequentially.



### Where I've Been and Where I Am Now – p. 120

1	Map your history to identify patterns, values and guiding principles from the past that inform your future and select the patterns and values from your past to carry forward and those to leave behind.	Not Started	In Progress	Finished
2	Identify your personal core values.	Not Started	In Progress	Finished
3	Map key driving forces and identify opportunities and risks impacting your life.	Not Started	In Progress	Finished
4	Define your relationship to wealth and how it may evolve over your various life stages.	Not Started	In Progress	Finished
5	Understand the impact of the family's growth and your desired degree of togetherness going forward.	Not Started	In Progress	Finished

### Where I Want to Go – p. 134

6	Explore your Calling and goals for development of your human and intellectual capital.	Not Started	In Progress	Finished
7	Explore the degrees of involvement in the Enterprise and opportunities for engagement.	Not Started	In Progress	Finished
8	Identify your desired roles within the Enterprise.	Not Started	In Progress	Finished
9	Complete your personal Enterprise Engagement Inventory.	Not Started	In Progress	Finished
10	Articulate your personal vision (both within the Enterprise and beyond).	Not Started	In Progress	Finished

### How I Plan to Get There – p. 144

11	Develop clear goals to support your vision (Enterprise and extra Enterprise).	Not Started	In Progress	Finished
12	Create a personal development plan to identify action steps to achieve your goals, including future engagement and roles in the Enterprise.	Not Started	In Progress	Finished
13	Work with a mentor or coach to support the successful execution of your plan.	Not Started	In Progress	Finished
14	Develop a process to receive honest feedback about your leadership skills and performance.	Not Started	In Progress	Finished
15	Periodically reassess and refine your vision and goals as life and Enterprise changes impact them.	Not Started	In Progress	Finished