



CLIENT CHECKLIST

DATE:

WORK

TRUE/FALSE My work stimulates
TRUE/FALSE I am proud of what I do for a living
TRUE/FALSE I feel appreciated in my workplace
TRUE/FALSE I respect the people I work with
TRUE/FALSE I know where my career is heading
TRUE/FALSE I respond to calls and emails in a timely manner
TRUE/FALSE I don't let my paperwork pile up
TRUE/FALSE I complete my work within reasonable hours
TRUE/FALSE I manage my time well
TRUE/FALSE I delegate without guilt

/10

FINANCES

TRUE/FALSE I am satisfied with my income
TRUE/FALSE I have a budget that I use
TRUE/FALSE I pay my bills on time
TRUE/FALSE I know how much I owe and when it will be paid off
TRUE/FALSE I have an active long-term financial plan
TRUE/FALSE I am able to reward myself without feeling guilty
TRUE/FALSE I use my credit card wisely
TRUE/FALSE I have a will
TRUE/FALSE My wallet is uncluttered
TRUE/FALSE My tax affairs are up to date

/10

HOME ENVIRONMENT

TRUE/FALSE I am happy with my home
TRUE/FALSE My home is generally clean & tidy
TRUE/FALSE I surround myself with things that I love
TRUE/FALSE I don't acquire clutter
TRUE/FALSE I recycle at home
TRUE/FALSE My personal files are in order
TRUE/FALSE My bed supports me having a good sleep
TRUE/FALSE My bed is always properly made
TRUE/FALSE I have photos of my loved ones on display
TRUE/FALSE I am happy with my mode of transport

/10

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HEALTH

- TRUE/FALSE I am happy with my current weight
TRUE/FALSE I do some form of exercise at least three times per week
TRUE/FALSE I have a balanced diet including lots of fresh food
TRUE/FALSE I don't smoke or drink alcohol excessively
TRUE/FALSE I drink at least 2 litres of water everyday
TRUE/FALSE I am up to date with all necessary medical & dental checkups
TRUE/FALSE I am happy with the sleep I get
TRUE/FALSE I have appropriate clothes for my work & personal interests
TRUE/FALSE I not concerned about my stress levels
TRUE/FALSE I feel generally well

/10

RELATIONSHIPS

- TRUE/FALSE I am happy with the level of intimacy in my life
TRUE/FALSE My partner & I respect each other & are equals
TRUE/FALSE I get along well with my work colleagues
TRUE/FALSE I make amends easily with people I have conflicts with
TRUE/FALSE I trust the significant people in my life
TRUE/FALSE I am on good speaking terms with my neighbours
TRUE/FALSE I consider myself to be a good friend
TRUE/FALSE I see people that are important to me regularly
TRUE/FALSE My friends & family know how much I care about them
TRUE/FALSE I am satisfied with my social life

/10

PERSONAL

- TRUE/FALSE I like myself
TRUE/FALSE I have had a birthday party in the last two years
TRUE/FALSE I have a life outside of work
TRUE/FALSE I have enough confidence to do what I want in life
TRUE/FALSE I have adequate holidays each year
TRUE/FALSE I don't lie or exaggerate
TRUE/FALSE I am comfortable saying no when I need to
TRUE/FALSE People know they can count on me, to do what I say I will do
TRUE/FALSE I can easily recalled the last time I really laughed & celebrated
TRUE/FALSE I have a form of creative expression

/10

Total for this checklist /60
Strongest area: %
Weakest area: %

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