



Today

Self-Assessment

Generating Your Own Happiness

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GENERATING YOUR OWN HAPPINESS

SELF ASSESSMENT PLAY SHEET

The purpose of this exercise is to provide an accurate view of the current state of your life. The purpose of doing a self-assessment is to give you an opportunity to look at your life in this moment and by noticing, you can see how to Generate Your Own Happiness.

“It’s not the things in life that you don’t know that will cause you problems, it’s the things you know that ain’t so.”

- Mark Twain

Getting to know you

Name:

Date of Birth:

Your top 5 Character Strengths:

- 1.
- 2.
- 3.
- 4.
- 5.

Your Goals

What are the top three goals you want to achieve in the next three months?

- 1.
- 2.
- 3.

What are the three most important changes you want to make in your life over the next three years?

- 1.
- 2.
- 3.

Personal History

What would you say have been the greatest accomplishments in your life to date?

What is the most difficult challenge you have overcome?

What is a dream or goal you have given up on?

What part of yourself if any, have you given up on?

Who are or have been your major role models? Would you be willing to add some? Why?

What major transitions have you had in the past three years?

Your Life:

On a scale of 1 (low) – 10 (high), rate the quality of your life today.

Is your life one of your choosing? If not, which parts are being chosen for you?

On a scale of 1 (lowest)-10 (highest), what number represents your current level of stress?

List your current primary sources of stress.

- 1.
- 2.
- 3.

List five things you are merely tolerating in your life. This can be anything from having a hole in your sock to unsupportive friends.

- 1.
- 2.
- 3.
- 4.
- 5.

What discourages or takes away your motivation?

What situations are obstacles in your life?

What is your highest excitement?

Who are the key people in your life and what do they provide for you?

Do you exercise? If yes, why? Please explain how and how often.

Background of Inner Work

Do you meditate? If yes, why and how often? Describe the inner work you have experienced and what methods were used.

Potential & Possibility:

What is your personal and professional vision?

Personal Vision:

Professional Vision:

What would you like to contribute to the world?

Deeper Dive - This section will help you identify areas you can work on now to generate your own happiness!

HEALTH & WELL-BEING

- 1. Do you have a regular exercise program?**
- 2. Are you overweight: Underweight?**
- 3. Are you at work on losing/gaining?**
- 4. Is your diet working for you?**
- 5. Do you have a nutrition plan?**
- 6. Do you have sufficient health insurance?**
- 7. Do you have regular medical checkups?**
- 8. Do you have any medical conditions that need to be addressed?**
- 9. Are there any tests you need done (sight, hearing, etc.)?**
- 10. Do you have any dental conditions that need to be addressed?**
- 11. Have your teeth been cleaned in the last year?**
- 12. Do you regularly get too little sleep? Too much sleep?**
- 13. Do you use nonprescription drugs or medications? If Yes, what?**
- 14. Do you have any habits that don't support you?**
- 15. How is your health/fitness on a scale of 1 to 10? (1 is poor, 10 is great)**

WORK / CAREER

1. Does your work/career represent you appropriately?

2. Is your work environment clean and organized? List any incomplete communications with management, co-workers, clients, etc.

3. Have you gossiped about anyone, received gossip about anyone or lied to anyone? If yes, with whom do you need to clean up gossip/lies?

4. Have you answered all written communications?

5. Have you returned all your calls?

List the calls you need to return.

List the calls you need to initiate.

6. Is there anything else incomplete about your job? List what:

FINANCIAL AND LEGAL MATTERS

- 1. Do you know what your disposable income is and what you owe?**
- 2. Do you have a checking account? Is it balanced?**
- 3. Do you have a savings account? Yes Is it reconciled?**
- 4. Do you have debts that are a problem for you or your creditors? If yes, list what is/are the problem(s).**
- 5. Do you have any incomplete tax matters? If yes, list what.**
- 6. Have you stolen any money or property? Is there anything incomplete in this regard?**
- 7. Have you destroyed any property? Is there anything incomplete in this regard?**
- 8. Do you have any outstanding traffic tickets?**
- 9. Do you have a will?**
- 10. Do you have a health care surrogate?**

List any other problematic money matters.

PERSONAL RELATIONSHIPS/ COMMUNICATION

1. List any incomplete communications with family, friends, neighbors, doctor/dentist, service people, officials, clergy, etc.

2. Have you gossiped about anyone in your personal life, received gossip about anyone or lied to anyone?

3. Have you answered all personal written communications?

List the personal written communications you need to answer.

4. List the personal written communications you need to initiate.

5. Have you returned all your personal calls?

List the personal calls you need to initiate.

PERSONAL ENVIRONMENT

HOME

- 1. Does your home represent you appropriately?**
- 2. Does it live up to your standards of impeccability?**
- 3. Are there any incomplete projects?**

Check the areas you need to clean up:

Kitchen

Living Room

Bedrooms

storage solution

Drawers

Closets

Bathrooms

Floors

Office

Appliances

Garage

Outside areas

Other

CLOTHES

- 1. Do your clothes represent you appropriately?**
- 2. Are all your clothes clean and in good repair?**
- 3. Are your shoes clean and in good repair?**
- 4. Are your closets and drawers arranged neatly?**
- 5. Do you need to discard or give away any clothes?**

CAR

- 1. Do you have routine maintenance performed regularly?**
- 2. Is your car in good repair and safe to drive?**
- 3. What needs to be repaired and by when will it be handled?**
- 4. Is your car clean inside and out?**

- 5. Does it need waxing?**
- 6. Is your vehicle registration current?**
- 7. Is your driver's license current?**
- 8. Is your insurance current and adequate?**

MISCELLANEOUS

1. Have you borrowed anything and not returned it?
2. Has someone borrowed something from you and not returned it?
If Yes, list what.
3. Is some part of your education incomplete?
4. Are you registered to vote?
5. Is there any other place where you are not doing what you said you would do and keeping your promises and agreements, (i.e. being on time for meetings and appointments, driving the speed limit, etc.)? If yes, make a list.
6. Are you being true to your standards and ideals? If not, list where.

Write down any resentments, regrets, notes or comments:

"If you tell the truth you don't have to remember anything"

- Mark Twain

If you leave incomplete projects to abound, they "sting" the unconscious and drag on you.

You may be unaware of the cause, but the effect will be your walking around feeling heavy, with the low-energy blues.

Even after you sleep like the dead for ten hours, you'll still think you need a great deal of sleep.

It's called the karma of in-completions.

- John-Roger (From: Passage Into Spirit)