

COMPLETE QUESTIONNAIRE CONTENT

Now, generate the full questionnaire following all specifications above.

Pillar 1: MENTAL AND EMOTIONAL WELL-BEING

Pillar Introduction:

"This pillar covers your emotional health, stress management, mental stimulation, therapy/counseling, anxiety/depression management, life satisfaction, sense of purpose, and emotional fulfillment."

A. CURRENT STATE (Individual)

1. * Rate your current overall mental/emotional well-being
(1-10) _____
2. * Rate your current stress level
(1-10) _____
3. Rate your current life satisfaction
(1-10) _____
4. How much effort do you currently invest in your mental/emotional health?
(1-10) _____
5. * Do you currently experience symptoms of anxiety or depression that affect your daily life?
 - ☐ ☐ Yes, currently receiving treatment
 - ☐ ☐ Yes, not receiving treatment but need to
 - ☐ ☐ Occasionally, manageable without treatment
 - ☐ ☐ No
6. * What are your top 2-3 emotional needs in your life right now?

7. What activities or practices help you feel emotionally balanced? (e.g., therapy, meditation, exercise, creative outlets)

8. * What are the biggest sources of stress in your life currently?

9. * What support do you need in this pillar?

10. Recent wins or progress in mental/emotional well-being:

B. CURRENT STATE (Partner Awareness)

11. * How satisfied do you think YOUR PARTNER is with their mental/emotional well-being?
(1-10) _____

Note: This is your prediction of your partner's answer

12. * How stressed do you think YOUR PARTNER currently is?
(1-10) _____

13. * What do you think your partner would say is their biggest emotional stressor?

14. * Rate how aligned you and your partner are in supporting each other's emotional needs
(1-10) _____

C. FUTURE VISION

15. What does optimal mental/emotional well-being look like for YOU in 1 year?

16. * What boundaries or changes would most improve your emotional well-being in the next year?

17. * As a couple, what should our approach to managing stress and emotions be in the next 1-5 years?

18. * Personal goal for this pillar (1-Year):

19. Personal goal for this pillar (5-Year):

20. * Couple goal for this pillar (1-Year):

21. Couple goal for this pillar (5-Year):

D. OBSTACLES & RESOURCES

22. * What are the top 3 obstacles that could prevent achieving these mental/emotional goals?

- a.

- b.

- c.

23. * What would you need from your partner to improve your emotional well-being?

24. What resources (time, money, therapy, alone time) do you need?

25. What thoughts/questions did this section spark to discuss during the planning session?

PILLAR 2: PHYSICAL HEALTH AND FITNESS

Pillar Introduction:

"This pillar covers exercise, nutrition, sleep, medical care, body image, energy levels, chronic conditions, and overall physical vitality."

A. CURRENT STATE (Individual)

26. * Rate your current overall physical health

(1-10) _____

27. Rate your current satisfaction with your fitness level

(1-10) _____

28. How much effort do you currently invest in physical health/fitness?

(1-10) ____

29. * Do you have any chronic health conditions or concerns?

a. ☐ Yes, being managed:

b. ☐ Yes, need attention but not addressing:

c. ☐ No

30. * Average hours of sleep per night: ____ hours

31. * Rate your sleep quality

(1-10) ____

32. Current exercise frequency:

a. ☐ 4+ times per week

b. ☐ 2-3 times per week

c. ☐ Once per week

d. ☐ Rarely/never

33. What are your primary pain points or frustrations with physical health?

34. What are recent wins or progress in physical health?

B. CURRENT STATE (Partner Awareness)

35. * How satisfied do you think YOUR PARTNER is with their physical health?

(1-10) ____

36. * What do you think your partner would say is their biggest health frustration?

37. * Rate how aligned you are as a couple in supporting each other's health goals

(1-10) ____

C. FUTURE VISION

38. * Personal physical health goal (1-Year):

39. Personal physical health goal (5-Year):

-
-
40. * Couple health/fitness goal (1-Year):
(e.g., cook healthy meals together, train for event, establish active lifestyle)
-
-

41. Couple health/fitness goal (5-Year):
-
-

D. OBSTACLES & RESOURCES

42. * Top 3 obstacles to better health:

- a. _____
b. _____
c. _____

43. * What support do you need from your partner for your health goals?
-
-
-

PILLAR 3: PROFESSIONAL LIFE AND CAREER

Pillar Introduction:

"This pillar covers career satisfaction, advancement goals, work-life balance, professional development, income expectations, and potential career changes."

A. CURRENT STATE (Individual)

44. * Rate your current career/professional satisfaction
(1-10) ____
45. * Rate your current work-life balance
(1-10) ____
46. How much effort are you investing in career development?
(1-10) ____
47. * Average hours worked per week: ____ hours
48. * Do you anticipate any major career changes in the next 5 years?
- a. ☐ Yes - promotion/advancement within current field
 - b. ☐ Yes - career change/new field
 - c. ☐ Yes - considering entrepreneurship/starting business

- d. ☐ Yes - considering leaving workforce/retirement
 - e. ☐ Yes - relocation for career
 - f. ☐ No major changes anticipated
 - g. ☐ Uncertain
49. * If a major career opportunity required relocation, would you want to pursue it?
- a. ☐ Yes, definitely
 - b. ☐ Yes, if partner agrees
 - c. ☐ Only if partner has equal opportunity there
 - d. ☐ Probably not
 - e. ☐ Definitely not

50. * What are your primary career frustrations or pain points?

51. What are recent career wins or progress?

B. CURRENT STATE (Partner Awareness)

52. * How satisfied do you think YOUR PARTNER is with their career?
(1-10) _____

53. * What do you think your partner's biggest career frustration is?

54. * Rate how aligned you are in supporting each other's career goals
(1-10) _____

C. FUTURE VISION

55. * Personal career goal (1-Year):

56. * Personal career goal (5-Year):

57. * How should we balance career ambitions with family/relationship needs in the next 1-5 years?

58. * If I achieve my career goals, what might I need to sacrifice or what might we need to accommodate as a couple?

D. OBSTACLES & RESOURCES

59. * Top 3 obstacles to career goals:

- a. _____
- b. _____
- c. _____

60. * What support do you need from your partner for your career goals?

61. * Trade-off question: If achieving your career goal required significantly less family time, would you still pursue it?

- a. ☐ Yes, career is priority
- b. ☐ Yes, but with guilt/concern
- c. ☐ Only if temporary
- d. ☐ No, family time is non-negotiable

62. What thoughts/questions did this section spark to discuss during the planning session?

PILLAR 4: FINANCIAL LIFE AND MATERIAL WELL-BEING (EXTENDED SECTION)

Pillar Introduction:

"This pillar covers income, expenses, debt, savings, investments, retirement, financial decision-making, money beliefs, and material lifestyle expectations. Research shows this is often the most sensitive pillar—please answer honestly as misalignment here predicts significant relationship conflict."

SUBSECTION A: Current Financial Reality

63. * Current combined annual household income (before taxes):

\$ _____

64. * Total assets (savings, investments, home equity, etc.):

\$ _____

65. * Total debts (mortgage, student loans, credit cards, auto, etc.):
\$ _____
66. * Monthly essential expenses (housing, utilities, food, insurance, etc.):
\$ _____
67. * Monthly discretionary spending (entertainment, dining out, hobbies, etc.):
\$ _____
68. * Rate your current financial stress level
(1-10) _____
69. * Rate your satisfaction with current financial situation
(1-10) _____

SUBSECTION B: Money Scripts & Background

70. * What were the primary messages about money you learned growing up?

71. * Describe your parents' relationship with money in 2-3 sentences:

72. * What's your earliest money memory?

73. * On a scale of 1-7, rate your comfort with debt:
(1-7) _____

74. * Complete this sentence: "Money is primarily for..."

- a. ☐ Security and safety
- b. ☐ Freedom and experiences
- c. ☐ Status and success
- d. ☐ Generosity and helping others
- e. ☐ Other: _____

SUBSECTION C: Decision-Making & Transparency

75. * At what dollar amount do you feel you should consult your partner before spending?
\$ _____

76. * Partners should have:

- a. ☐ Fully joint accounts (all money combined)
- b. ☐ Mostly joint with small separate "fun money" accounts
- c. ☐ Separate accounts with joint account for bills
- d. ☐ Fully separate accounts

77. * How much financial privacy should partners have?
(1-10) _____

78. * Have you ever hidden a purchase or debt from your partner?
- a. ☐ Yes _____
 - b. ☐ No
 - c. ☐ Prefer not to answer

79. * How should we make decisions about purchases over \$ _____?

80. * Who should handle: (Select for each)
- a. Bill paying: ☐ Me ☐ Partner ☐ Shared ☐ Doesn't matter
 - b. Investment decisions: ☐ Me ☐ Partner ☐ Shared ☐ Professional advisor
 - c. Budget tracking: ☐ Me ☐ Partner ☐ Shared ☐ Neither (we should start)
 - d. Major purchase research: ☐ Me ☐ Partner ☐ Shared

SUBSECTION D: Risk Tolerance & Investment Philosophy

81. * Rate your investment risk tolerance
(1-10) _____
82. * What percentage of investments should be in: (must total 100%)
- a. Stocks: _____%
 - b. Bonds: _____%
 - c. Real Estate: _____%
 - d. Cash/Savings: _____%
83. * I believe in:
- a. ☐ Actively managing investments (picking stocks, timing market)
 - b. ☐ Passive index investing (set it and forget it)
 - c. ☐ Using professional financial advisors
 - d. ☐ Minimal investing (prioritize safety/savings)
84. * How satisfied do you think YOUR PARTNER is with our investment approach?
(1-10) _____

SUBSECTION E: Retirement & Long-Term Planning

85. * At what age do you want to retire?
Age: _____
86. * What annual retirement income would you need to feel comfortable?
\$ _____ per year
87. * Retirement planning should be:
- a. ☐ Top priority now (maximize savings even if less enjoyment today)
 - b. ☐ Balanced with present enjoyment (save adequately but live well now)
 - c. ☐ Something to worry about later (prioritize present quality of life)
88. * How much should we be saving monthly for retirement?
\$ _____ per month
89. * At what age do you think YOUR PARTNER wants to retire?
Age: _____

SUBSECTION F: Spending Philosophy & Fun Money

90. * What percentage of income should go to: (must total 100%)
- a. Savings/Investments: ____%
 - b. Necessities (housing, food, utilities): ____%
 - c. Fun/Discretionary: ____%
91. * Each partner should have how much individual "no questions asked" fun money per month?
- \$_____ per month per person
92. * Rank in order of importance (1=most important, 3=least important):
- a. ____ Financial security
 - b. ____ Life experiences (travel, events, activities)
 - c. ____ Material possessions (nice home, car, clothes, gadgets)
93. What do you think YOUR PARTNER would rank as most important?
- a. ☐ Financial security
 - b. ☐ Life experiences
 - c. ☐ Material possessions

SUBSECTION G: Extended Family & Obligations

94. * What financial obligations do you expect toward your parents/family?
- _____
- _____
95. * How much would you be comfortable loaning/giving to family members without consulting partner?
- \$_____
96. * How much would you be comfortable loaning/giving to family members WITH partner discussion?
- \$_____
97. * Should we financially support adult children beyond age ____?
- Age: _____ OR ☐ N/A (no children / no support planned)
98. * How should we handle inheritance from our parents?
- a. ☐ Combine with joint finances
 - b. ☐ Keep separate as individual assets
 - c. ☐ Partially combine (____%)
 - d. ☐ Discuss when the time comes
 - e. ☐ Other: _____

SUBSECTION H: Major Purchase Philosophy

99. * How important is it to own your home vs. rent?
- (1-10) _____
100. * New cars or used cars?
- a. ☐ New cars (worth it for warranty/reliability)

- b. ☐ Certified pre-owned (best value)
- c. ☐ Used cars (maximize savings)
- d. ☐ Don't care, case-by-case

* Rate your tolerance for each type of debt:

Credit card debt: (1-10) _____

Car loans: (1-10) _____

Mortgage debt: (1-10) _____

Investment loans (margin, business loans): (1-10) _____

SUBSECTION I: Values & Charitable Giving

101. What percentage of income should go to charitable giving/tithing?

____% OR ☐ N/A / None planned

102. Describe your philosophy on financial generosity:

SUBSECTION J: Financial Goals & Partner Awareness

103. * Personal financial goal (1-Year):

104. * Personal financial goal (5-Year):

105. * Couple financial goal (1-Year):

106. * Couple financial goal (5-Year):

107. * Top 3 obstacles to financial goals:

- a. _____
- b. _____

c. _____
108. * How satisfied do you think YOUR PARTNER is with our financial situation?
(1-10) _____

109. * What do you think YOUR PARTNER'S biggest financial concern is?

110. * Rate your alignment as a couple on financial matters
(1=major misalignment, 10=perfectly aligned)
(1-10) _____

111. What thoughts/questions did this section spark to discuss during the planning session?

PILLAR 5: RELATIONSHIPS AND SOCIAL LIFE

Pillar Introduction:

"This pillar covers friendships, family relationships, social activities, time together vs. apart, extended family involvement, and social lifestyle preferences."

A. CURRENT STATE (Individual)

112. * Rate your satisfaction with amount of quality time together as a couple
(1=nowhere near enough, 10=perfect amount)
(1-10) _____

113. * Rate your satisfaction with amount of individual/alone time
(1=nowhere near enough, 10=perfect amount)
(1-10) _____

114. Rate your satisfaction with your friendships and social connections
(1-10) _____

115. How much effort do you invest in maintaining friendships?
(1-10) _____

116. * How often do you need social activities / time with friends?
a. ☐ Multiple times per week
b. ☐ Once per week
c. ☐ 2-3 times per month
d. ☐ Once per month
e. ☐ Rarely / I'm an introvert

117. * How involved should extended family be in our lives?
(1=minimal contact, 10=very integrated/frequent contact)
(1-10) _____

118. * Current pain points in relationships/social pillar:

119. Recent wins in relationships/social pillar:

B. CURRENT STATE (Partner Awareness)

120. * How satisfied do you think YOUR PARTNER is with the amount of quality couple time?
(1-10) _____

121. * How satisfied do you think YOUR PARTNER is with their amount of alone time?
(1-10) _____

122. * What do you think your partner would say is their biggest relationship/social frustration?

123. * Rate your alignment on social lifestyle preferences
(1-10) _____

C. FUTURE VISION

124. * How should we balance couple time, individual time, and social time in the next year?

125. * What boundaries do we need with extended family?

126. Personal relationship goal (1-Year):
(e.g., deepen friendships, establish boundaries, reconnect with old friends)

127. * Couple relationship goal (1-Year):
(e.g., weekly date nights, annual trips, establish traditions)

128. Couple relationship goal (5-Year):

D. OBSTACLES & Resources

129. * Top 3 obstacles to better relationships/social life:

- a. _____
- b. _____
- c. _____

130. * What support do you need from your partner in this pillar?

131. What thoughts/questions did this section spark to discuss during the planning session?

PILLAR 6: SPIRITUAL AND INTELLECTUAL LIFE

Pillar Introduction:

"This pillar covers religious/spiritual beliefs, personal growth, learning, values, ethics, meaning/purpose, cultural identity, and intellectual engagement."

A. CURRENT STATE (Individual)

132. * Rate your satisfaction with your spiritual/religious life

(1=very dissatisfied, 10=very satisfied) OR ☐ N/A (not applicable to me)

(1-10) _____

133. Rate your satisfaction with your intellectual growth and learning

(1-10) _____

134. How much effort do you invest in personal growth, learning, or spiritual practice?

(1-10) _____

135. * How important is religious/spiritual practice to you?

(1=not important, 10=central to my identity)

(1-10) _____

136. * How important is it that your partner shares your religious/spiritual beliefs?
(1=not important, 10=absolutely essential)
(1-10) _____

137. * If you have/plan to have children, how should we raise them regarding
religion/spirituality?

OR ☐ N/A (no children planned)

138. * What are your core values? (List top 3-5)
(e.g., integrity, family, growth, freedom, service, creativity, stability, adventure)

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

139. * Which values are non-negotiable for you (i.e., dealbreakers if violated)?

140. What gives your life meaning and purpose?

141. Current frustrations in spiritual/intellectual pillar:

142. Recent wins in spiritual/intellectual pillar:

B. CURRENT STATE (Partner Awareness)

143. * How satisfied do you think YOUR PARTNER is with their spiritual/intellectual life?
(1-10) _____

144. * What do you think YOUR PARTNER'S top 3 core values are?

- a. _____
- b. _____
- c. _____

145. * Rate your alignment on core values and life philosophy
(1-10) _____

C. FUTURE VISION

146. * Personal spiritual/intellectual goal (1-Year):

147. Personal spiritual/intellectual goal (5-Year):

148. * As a couple, what shared meaning or purpose should we cultivate in the next 1-5 years?

149. * Couple goal for this pillar (1-Year):

D. Obstacles & Resources

150. * Top 3 obstacles to spiritual/intellectual goals:

- a.

- b.

- c.

151. * What support do you need from your partner in this pillar?

152. What thoughts/questions did this section spark to discuss during the planning session?

CROSS-PILLAR INTEGRATION SECTION

153. * Rank the six pillars in order of current importance to you:

- a. ____ Mental and Emotional Well-being
- b. ____ Physical Health and Fitness
- c. ____ Professional Life and Career
- d. ____ Financial Life and Material Well-being
- e. ____ Relationships and Social Life

- f. ____ Spiritual and Intellectual Life
154. * Rank the six pillars in order of where you currently invest the most time/energy:
- a. ____ Mental and Emotional Well-being
 - b. ____ Physical Health and Fitness
 - c. ____ Professional Life and Career
 - d. ____ Financial Life and Material Well-being
 - e. ____ Relationships and Social Life
 - f. ____ Spiritual and Intellectual Life
155. * Which pillar needs the most improvement in YOUR life?
- a. ☐ Mental and Emotional
 - b. ☐ Physical Health
 - c. ☐ Professional/Career
 - d. ☐ Financial
 - e. ☐ Relationships/Social
 - f. ☐ Spiritual/Intellectual
156. * Which pillar needs the most improvement in OUR RELATIONSHIP?
- a. ☐ Mental and Emotional
 - b. ☐ Physical Health
 - c. ☐ Professional/Career
 - d. ☐ Financial
 - e. ☐ Relationships/Social
 - f. ☐ Spiritual/Intellectual
157. * If you could only make significant progress in ONE pillar this year, which would it be?
- a. ☐ Mental and Emotional
 - b. ☐ Physical Health
 - c. ☐ Professional/Career
 - d. ☐ Financial
 - e. ☐ Relationships/Social
 - f. ☐ Spiritual/Intellectual
158. Which pillar are you most satisfied with currently?
- a. ☐ Mental and Emotional
 - b. ☐ Physical Health
 - c. ☐ Professional/Career
 - d. ☐ Financial
 - e. ☐ Relationships/Social
 - f. ☐ Spiritual/Intellectual
159. * Is there significant misalignment between what you value (importance ranking) and where you invest effort?
- a. ☐ Yes, and this bothers me
 - b. ☐ Yes, but this is temporary / necessary for now
 - c. ☐ No, pretty well aligned
-

160. What thoughts/questions did this section spark to discuss during the planning session?

FINAL GOAL SYNTHESIS SECTION

TOP 3 PERSONAL GOALS (1-YEAR)

PERSONAL GOAL #1 (1-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

PERSONAL GOAL #2 (1-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

PERSONAL GOAL #3 (1-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1. _____
2. _____
3. _____

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

TOP 3 PERSONAL GOALS (5-YEAR)

PERSONAL GOAL #1 (5-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

PERSONAL GOAL #2 (5-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

PERSONAL GOAL #3 (5-Year):

Goal Statement:

Why this matters to me:

Specific Measurable Outcome (What does success look like?):

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will I measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed (Time, money, support):

Potential Obstacles:

Potential Conflicts (What other goals might this impact?):

Support needed from partner:

TOP 3 COUPLE GOALS (1-YEAR)

COUPLE GOAL #1 (1-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
- ☐ Primarily MY PARTNER
- ☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

COUPLE GOAL #2 (1-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
☐ Primarily MY PARTNER
☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

COUPLE GOAL #3 (1-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
☐ Primarily MY PARTNER
☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

TOP 3 COUPLE GOALS (5-YEAR)

COUPLE GOAL #1 (5-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
☐ Primarily MY PARTNER
☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

COUPLE GOAL #2 (5-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
☐ Primarily MY PARTNER
☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

COUPLE GOAL #3 (5-Year):

Goal Statement:

Why this matters to our relationship:

Specific Measurable Outcome (What does success look like for US?):

Does this goal serve:

- ☐ Primarily ME
☐ Primarily MY PARTNER
☐ THE RELATIONSHIP as its own entity

First 3 Actionable Steps (Leading Indicators):

1.

2.

3.

Success Metrics (How will WE measure progress?):

Review Schedule:

☐ Weekly ☐ Bi-weekly ☐ Monthly ☐ Quarterly

Resources Needed from BOTH partners:

Potential Obstacles:

161. What thoughts/questions did this section spark to discuss during the planning session?

GOAL CONFLICT ANALYSIS

162. Are there any conflicts between your personal goals and your couple goals?

☐ Yes ☐ No

If yes, explain:

163. Are there any of your personal goals that might conflict with what you think your partner's goals are?

☐ Yes ☐ No

If yes, explain:

164. What support do you need from your partner to achieve your personal goals?

165. What support can you realistically offer your partner for their goals?

166. Which goals might require one of us to sacrifice something significant?

167. How will we handle it if we have to choose between individual goals and couple goals?

168. What does our RELATIONSHIP need (as its own entity) versus what we individually want?

169. What thoughts/questions did this section spark to discuss during the planning session?

PLANNING PROCESS META-QUESTIONS

170. How often should we have dedicated planning sessions like this?

- a. ☐ Quarterly (every 3 months)
- b. ☐ Bi-annually (every 6 months)
- c. ☐ Annually
- d. ☐ As-needed

171. How do you prefer to make joint decisions?

- a. ☐ Full consensus required (both must genuinely agree)
- b. ☐ Compromise/meet in the middle
- c. ☐ Take turns leading (you decide this time, I decide next)
- d. ☐ Whoever feels most strongly decides
- e. ☐ Other: _____

172. When we disagree on important issues, what works best for YOU?

- a. ☐ Talk it through immediately
- b. ☐ Take time to think separately first, then discuss
- c. ☐ Seek outside perspective (counselor, trusted friend)
- d. ☐ Table it and revisit when less emotional

- e. ☐ Other: _____
173. What makes you feel heard and valued in discussions?
- _____
- _____
174. What communication patterns should we avoid?
(e.g., interrupting, dismissing feelings, bringing up past issues, etc.)
- _____
- _____
175. On a scale of 1-10, how confident are you that we can achieve our goals together?
(1-10) _____
176. What gives you the most hope about our future?
- _____
- _____
177. What concerns you most about our future?
- _____
- _____
- _____