

WORKSHOP 2: SUMMARY

In this section, we learned about what Person-Directed Planning is and how it can be useful for identifying your strengths and creating unique, self-directed plans to achieve your dreams.

We began our person-directed plans by thinking about our lives now --where we live, work, and other aspects of our current financial situations. Then, we identified what is working well and what isn't.

Next, we identified our strengths, gifts, and capacities.

This helps us to recognize our unique skills and abilities, which we can use to achieve our goals. Keeping our strengths in mind, we brainstormed our financial dreams and life goals -- where we'd like to live and work and how we'd like our finances and relationships with money to be in the future.

Then, we imagined our lives one year from now -- what our lives and our relationships with money will look like when we are one year closer to our dreams.

Finally, we created an Action Plan for how we will achieve our short-term and long-term financial goals.