5. LONG-TERM GROWTH, FREEDOM & LEGACY WORKSHEET

Build the future you want. Leave the legacy that matters.

Wealth is more than money.
Freedom is more than time.
Legacy is more than things.
Your choices today shape tomorrow for you and others.

This worksheet helps you look beyond today. It supports you to grow your wealth, create financial freedom and leave a positive and lasting legacy.
Use it to align your money with your values and your long-term vision.

1. YOUR LONG-TERM VISION

What do you want your life to look like in 10, 20 or 30 years?
What kind of freedom do you want?
What impact do you want to have?

In the future, I want to...

_____

_____

_____

_____

_____

2. FINANCIAL FREEDOM CHECK

Rate how close you feel you are to financial freedom in each area.
1 = Far Away 3 = Making Progress 5 = On Track

FREEDOM AREA	1	2	3	4	5
Debt Freedom	○	○	○	○	○
Time Freedom	○	○	○	○	○
Location Freedom	○	○	○	○	○
Work / Purpose Freedom	○	○	○	○	○
Lifestyle Freedom	○	○	○	○	○
Choice & Flexibility	○	○	○	○	○
Financial Independence	○	○	○	○	○
Peace of Mind	○	○	○	○	○

What would more financial freedom allow you to do?

_____

3. WEALTH GROWTH CHECK

Review how you are growing and managing your wealth.
Rate each area from 1 (Weak) to 5 (Strong).

GROWTH AREA	1	2	3	4	5
Regular Saving	○	○	○	○	○
Investing for Growth	○	○	○	○	○
Diverse Investments	○	○	○	○	○
Long-Term Thinking	○	○	○	○	○
Review & Rebalancing	○	○	○	○	○
Understanding Risk	○	○	○	○	○
Use of Tax Efficiency	○	○	○	○	○
Professional Guidance	○	○	○	○	○

What is your biggest opportunity to grow your wealth?

_____

4. LEGACY & IMPACT CHECK

Consider the legacy you want to leave.
Rate each area from 1 (Weak) to 5 (Strong).

LEGACY AREA	1	2	3	4	5
Family & Loved Ones	○	○	○	○	○
Values & Principles	○	○	○	○	○
Financial Legacy	○	○	○	○	○
Contributing to Others	○	○	○	○	○
Community Impact	○	○	○	○	○
Mentoring / Teaching	○	○	○	○	○
Creating Something Lasting	○	○	○	○	○
Making a Difference	○	○	○	○	○

What kind of legacy is most important to you?

_____

5. YOUR PRIORITIES

You cannot do everything. Which areas matter most right now?
Choose your top three priorities.

PRIORITY	WHY IT MATTERS	TARGET DATE
1.		
2.		
3.		

6. YOUR ACTION PLAN

Choose up to three actions that will move you closer to your future.

ACTION	WHY THIS MATTERS	TARGET DATE
1.		
2.		
3.		

7. POTENTIAL ROADBLOCKS

What might get in the way of your long-term goals?
How can you prepare for them?

ROADBLOCK	HOW I WILL MANAGE IT
1.	
2.	
3.	

8. REVIEW DATE

Set a date to review your progress and adjust your plan.

I will review this plan on: _____/_____/_____

Your future is created by today's decisions.
Think long term.
Stay consistent.
Leave a legacy you are proud of.

This is one of the Five Pillars of The Market Man Method™.
Plan ahead. Grow wisely.
Create freedom. Leave a legacy.

More free tools and resources are available to help you take action and build a better future.
Visit: themarketmanmethod.co.uk