



JAAED VISION  
BOSS. MOM. WOMAN.

# LIFE AUDIT



Let's plan strategically and choose you.



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# WELCOME!

...to the Boss. Mom. Woman. Life Audit Workbook.

This workbook started as my personal way to quickly check in with myself each year—to figure out what’s working, what’s not, and how I could prepare for the year ahead. As I began helping fellow B.M.W.’s rebrand their lives, I realized how powerful this process could be for others, too. Let’s face it: so many of us are carrying around baggage that no longer serves us. It’s time to let it go.

This guide is here to help you take a closer look at your life, reflect on what truly matters, and make intentional changes that bring balance and fulfillment. By diving into key areas like personal, professional, family, financial, love, and spiritual, you’ll uncover what aligns with your goals and what might be holding you back.

Take your time, be honest, and trust the process. Remember, even small steps can lead to big transformations. You’ve got this, and I’m so glad you’re here to take this journey with me!

Let’s get started!

xoxo, Jazz



# WHAT'S WORKING?

Take a moment to reflect on the positive aspects of your life. Identify what's going well in each area, and celebrate your wins. This section is a reminder that you're already doing amazing things.

## 01

### Personal

- What's bringing you joy?
- What habits or routines support your well-being?

## 02

### Professional

- What career achievements are you proud of?
- What work dynamics energize you?

## 03

### Family

- What relationships feel fulfilling?
- What traditions or moments bring your family together?



## 04

### Financial

- What financial habits are helping you reach your goals?
- What financial decisions have brought you peace?

## 05

### Love

- What aspects of your romantic relationship are thriving?
- What moments make you feel deeply connected?

## 06

### Spiritual

- What practices or beliefs nurture your soul?
- What brings you a sense of peace or purpose?

# THINK IT THROUGH

## Step 1: Reflect and Identify

For each area of your life, write down what is working and note why You can use the questions on 2 as a guide.

| Life Area    | What is working? | Why does it work? |
|--------------|------------------|-------------------|
| Personal     |                  |                   |
| Professional |                  |                   |
| Family       |                  |                   |
| Financial    |                  |                   |
| Love         |                  |                   |
| Spiritual    |                  |                   |





## WHAT ISN'T WORKING

Here, you'll identify areas of your life that may need attention or change. Reflect deeply, and don't rush this process—it's the first step toward meaningful transformation.

- Step 1: Reflect and Identify
  - Personal: What habits drain your energy?
  - Professional: What tasks or dynamics cause frustration?
  - Family: Are there unresolved conflicts or unmet needs?
  - Financial: What spending habits are holding you back?
  - Love: Are there communication gaps or unmet expectations?
  - Spiritual: What's missing from your spiritual journey?

# GUIDED PROMPTS

## Step 2: Reflect

Use the following prompts to help you answer the questions on page 4

What feels like the biggest source of frustration in each area of your life?

If this problem were solved, how would your life improve?

What emotions come up when you think about this issue (e.g., guilt, resentment, overwhelm)?

# THINK IT THROUGH

## Step2: Reflect and Identify

For each area of your life, write down what isn't working and note why it falls into that category.

| Life Area    | What isn't working?                                                                 | Why? |
|--------------|-------------------------------------------------------------------------------------|------|
| Personal     |                                                                                     |      |
| Professional |                                                                                     |      |
| Family       |                                                                                     |      |
| Financial    |  |      |
| Love         |                                                                                     |      |
| Spiritual    |                                                                                     |      |

# GUIDED PROMPTS

## Step 2: Categorize

From your reflect sheet, identify and categorize using questions below.

Does this align with your goals or values? Why?  
If not, it's a candidate for elimination.

Is there a simpler or better way to handle this? If yes, it might  
need adjustment.

Does this bring you joy or move you toward a priority? If so, keep it  
but make it sustainable.



# WHAT ISN'T WORKING SUMMARIZED

- Step 2: Categorize (Keep, Eliminate, Adjust)
  - Use the table below to organize your reflections. Write each item under the appropriate category.

| Life Area    | Keep | Eliminate | Adjust |
|--------------|------|-----------|--------|
| Personal     |      |           |        |
| Professional |      |           |        |
| Family       |      |           |        |
| Financial    |      |           |        |
| Love         |      |           |        |
| Spiritual    |      |           |        |



## Step 3: PLAN OF ACTION

For each item in the "Eliminate" or "Adjust" categories, write out a simple action plan. Small steps lead to big changes!

### **Eliminate**

- Identify what can be removed: How will you phase it out? Who can support you?
- Example: "Stop attending a weekly meeting that no longer serves me by delegating it to a team member."

### **Adjust**

- Decide what adjustments are needed: What resources or habits can you implement?
- Example: "Shift work hours by starting 30 minutes earlier to free up evenings for family time."

| Life Area | Category | Action Steps                                                                       | Action Date |
|-----------|----------|------------------------------------------------------------------------------------|-------------|
|           |          |  |             |
|           |          |                                                                                    |             |
|           |          |                                                                                    |             |
|           |          |                                                                                    |             |
|           |          |                                                                                    |             |
|           |          |                                                                                    |             |

# ACTION PLAN

| Life Area | Category  | Action Steps                                               | Action Date |
|-----------|-----------|------------------------------------------------------------|-------------|
| Personal  | Eliminate | Cancel gym membership and explore at-home workout options. | 1/1/20XX    |
|           |           |                                                            |             |
|           |           |                                                            |             |
|           |           |                                                            |             |
|           |           |                                                            |             |
|           |           |                                                            |             |
|           |           |                                                            |             |



# GUIDED PROMPTS

## Step 3: Action Plan

What's the smallest action you can take to start addressing this?

Who or what can support you in this process (e.g., partner, app, friend)?

What might get in the way, and how can you prepare for that?

# PROGRESS TRACKER

Use this space to track your weekly progress. Check off each small step you complete, and reflect on your wins!

| Week | Steps Taken                | Reflection                                                                   |
|------|----------------------------|------------------------------------------------------------------------------|
| 1    | Shifted bedtime to 10 PM.. | Felt more energized, but still waking up groggy due to phone use before bed. |
|      |                            |                                                                              |
|      |                            |                                                                              |
|      |                            |                                                                              |
|      |                            |                                                                              |
|      |                            |                                                                              |

# GUIDED PROMPTS

## Step 4: Reflect on Progress

What worked well this week, and how can you build on that?

What didn't work, and why? Was it time, energy, or resources?

What's one thing you can tweak or try differently next week?

## EXAMPLES FOR INSPIRATION



| <b>Keep</b>      | <ul style="list-style-type: none"> <li>• Personal: Morning meditation routine.</li> <li>• Professional: Key project at work.</li> <li>• Family: Weekend family outings.</li> </ul>                                                       |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Eliminate</b> | <ul style="list-style-type: none"> <li>• Personal: Negative self-talk.</li> <li>• Professional: Unnecessary meetings.</li> <li>• Family: Overloading kids' schedules.</li> </ul>                                                         |
| <b>Adjust</b>    | <ul style="list-style-type: none"> <li>• Personal: Shift bedtime from 11 PM to 10 PM.</li> <li>• Professional: Batch emails into two focused time slots daily.</li> <li>• Family: Limit activities to one per child per week.</li> </ul> |

## NEXT STEPS

You're at the end of this workbook. Now it's time to reflect on:

|                                                                   |                                                                                     |
|-------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <p>What changes brought the most relief or joy?</p>               |  |
| <p>How will you sustain these positive changes?</p>               |                                                                                     |
| <p>Who will you share your progress with to stay accountable?</p> |                                                                                     |





# GOOD JOB!

As you progress, revisit this workbook regularly to refine your actions and celebrate your wins. Life evolves, and so should your approach to it. Remember, every small step adds up to big changes!

You've taken a brave step in prioritizing your growth and happiness. Celebrate your efforts, and keep moving forward!



## **Coach Jazmine**

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