

# What Matters Most:

*A Time to Reflect, Plan, and Enjoy*

---

RonaldBlueTrust™

Wisdom for Wealth. *For Life.*®

800-841-0362 | [www.ronblue.com](http://www.ronblue.com)

# WELCOME!

We are so glad that you have chosen to have a planning weekend by using our guide, “What Matters Most: A Time to Reflect, Plan, and Enjoy.” The ideal setting is a hotel or a bed and breakfast that provides a break from your daily distractions where you can have personal quiet time and space to process and dialogue. The objective of the weekend is to help you and your spouse enhance your communication and experience unity in your life decisions.

## A BIBLICAL PERSPECTIVE

Without goals, our decisions are often dictated by other people, unchecked emotions, and perceived urgency, all of which obstruct wise decision making. With goals, we are more likely to live with purpose and make the most of our time.

*“Look carefully then how you walk, not as unwise men but as wise, making the most of your time, because the days are evil. So then do not be foolish, but understand what the will of the Lord is.”*

*Ephesians 5:15-17 NASB*

Even though slowing down and setting goals can be challenging, it is very important to do. Hitting the pause button to carefully examine our hopes and dreams allows us to live more intentionally. The first step is prayer. Spend time alone with God, and as a couple, seek wisdom from the Holy Spirit.

*“Commit your works to the Lord and your plans will be established.”*

*Proverbs 16:3 NASB*

The institution of marriage is ordained by God as one of His primary vehicles through which He works to conform us to His image. As two having become one, it is vital to discuss your goals together and lean on each other to help one another in this process, seeking unity on as many goals as possible. Hopefully this weekend will be a springboard for these conversations to continue in the weeks and months to come.

*“...make my joy complete by being of the same mind, maintaining the same love, united in spirit, intent on one purpose.”*

*Philippians 2:2 NASB*

## OVERVIEW

The guide consists of four sections: Spiritual, Marriage/Family, Financial, and Social/Personal. Each section contains a number of statements that begin with the phrase, “I am satisfied with...” Your job is to score each statement by your level of satisfaction (1 = Not satisfied, 5 = Very satisfied). If needed, you can write a few notes on the line below each statement. Feel free to add any additional statements that may be helpful to you.

Once you have scored each statement individually, you will come together as a couple to discuss your answers, paying most attention to the statements with either low satisfaction scores or where there is a wide variance between your answer and your spouse’s. Ask your spouse questions to uncover the reasons behind his or her scores. Pick out the statements where you most want to improve your level of satisfaction. Use the Notes page near the end of each section to capture your thoughts and the key areas for improvement (the “Big Rocks”).

At the end of the process, spend time as a couple writing down the most important action steps you want to pursue in each area. These may be obvious and straight forward, or they may be more complex and require a series of steps. Translating your goals into action steps will be the key to achieving each goal. For example, it is not enough to say that you want to grow closer as a couple spiritually. Write down specific action steps to help accomplish the goal, such as reading the Bible together three times each week and praying together daily. Use the Action Steps page at the end of each section to write down the actions you want to follow in order to accomplish your most important goals and stay focused on what matters most.

# SPIRITUAL

Circle the number that best represents your response to the statements below

**I am satisfied:**

1 = Not satisfied, 5 = Very satisfied, \* = Unsure

1....with my time with the Lord praying and reading the Bible                    1   2   3   4   5   \*

---

2....with how I encourage my spouse spiritually    1   2   3   4   5   \*

---

3....with my involvement in the church    1   2   3   4   5   \*

---

4....with how I am using my spiritual gifts    1   2   3   4   5   \*

List out your spiritual gifts \_\_\_\_\_

5....with my involvement in ministry    1   2   3   4   5   \*

List out your ministry focus \_\_\_\_\_

6....with how we are growing as a couple spiritually    1   2   3   4   5   \*

---

7....with how I am praying for those closest to me    1   2   3   4   5   \*

---

8...with how we are leading our family spiritually    1   2   3   4   5   \*

---

9...with my involvement in Bible study/accountability groups      1   2   3   4   5   \*

---

10...with the amount of spiritual growth I've experienced this year      1   2   3   4   5   \*

---

# NOTES

Use this Notes section to elaborate on some of the statements where your satisfaction was not as high as you would have liked.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# ACTION ITEMS

Use this Action Items section to capture the most important goals and follow-up steps that result from your discussions with your spouse. The most effective goals are specific, measurable, and attainable.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# MARRIAGE/FAMILY

Circle the number that best represents your response to the statements below

**I am satisfied:**

1 = Not satisfied, 5 = Very satisfied, \* = Unsure

1...with how close we are as a couple 1 2 3 4 5 \*

---

2...with how I am meeting my spouse’s emotional, physical, and intellectual needs 1 2 3 4 5 \*

---

3... with how my spouse is meeting my emotional, physical, and intellectual needs 1 2 3 4 5 \*

---

4...with how we communicate with each other 1 2 3 4 5 \*

---

5...with how often we go on dates 1 2 3 4 5 \*

---

6...with how often we tell each other, “I love you!” 1 2 3 4 5 \*

---

7...with how much and where we vacation 1 2 3 4 5 \*

---



8...with our level of physical intimacy 1 2 3 4 5 \*

---

**As it relates to children, grandchildren, or close family members, I am satisfied:**

9...with how we support and encourage them 1 2 3 4 5 \*

---

10...with how close we are as a family 1 2 3 4 5 \*

---

11...with how much time we spend together 1 2 3 4 5 \*

---

12...with their ability to handle money 1 2 3 4 5 \*

---



# ACTION ITEMS

Use this Action Items section to capture the most important goals and follow-up steps that result from your discussions with your spouse. The most effective goals are specific, measurable, and attainable.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# FINANCIAL

Circle the number that best represents your response to the statements below

**I am satisfied:**

1 = Not satisfied, 5 = Very satisfied, \* = Unsure

1....with our income 1 2 3 4 5 \*

---

2....with our spending habits 1 2 3 4 5 \*

---

3....with our amount of cash in checking and savings 1 2 3 4 5 \*

---

4....with our level of debt 1 2 3 4 5 \*

---

5....with our level and quality of insurance protection 1 2 3 4 5 \*

---

6....that we are on track to maintain our chosen lifestyle 1 2 3 4 5 \*

---

7....with our current investment strategy 1 2 3 4 5 \*

---

8....with the overall organization of our finances 1 2 3 4 5 \*

---

9...with the amount we are leaving to our family through our estate      1   2   3   4   5   \*

---

10...with our level of charitable giving      1   2   3   4   5   \*

---

11...with our ability to make wise financial decisions      1   2   3   4   5   \*

---

12...with our ability to communicate openly on money matters      1   2   3   4   5   \*

---

13...that financial issues do not cause me excessive stress and strain      1   2   3   4   5   \*

---

14...with the level of peace of mind I have on money issues      1   2   3   4   5   \*

---

# NOTES

Use this Notes section to elaborate on some of the statements where your satisfaction was not as high as you would have liked.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# ACTION ITEMS

Use this Action Items section to capture the most important goals and follow-up steps that result from your discussions with your spouse. The most effective goals are specific, measurable, and attainable.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# SOCIAL/PHYSICAL

Circle the number that best represents your response to the statements below

**I am satisfied:**

1 = Not satisfied, 5 = Very satisfied, \* = Unsure

1....with my balance between time at home and time away from home    1   2   3   4   5   \*

---

2....with how much we entertain    1   2   3   4   5   \*

---

3.... with my relationships with my best friends    1   2   3   4   5   \*

---

4....with our relationships with our neighbors    1   2   3   4   5   \*

---

5....with our involvement in the community    1   2   3   4   5   \*

---

6....with the amount of time I spend with those in need    1   2   3   4   5   \*

---

7....with my eating habits    1   2   3   4   5   \*

---

8....with my weight    1   2   3   4   5   \*

---



9...with the amount of exercise I get 1 2 3 4 5 \*

---

10...with how we divide up the household responsibilities 1 2 3 4 5 \*

---

11...with how often we attend concerts, sporting events, etc. 1 2 3 4 5 \*

---

# NOTES

Use this Notes section to elaborate on some of the statements where your satisfaction was not as high as you would have liked.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

# ACTION ITEMS

Use this Action Items section to capture the most important goals and follow-up steps that result from your discussions with your spouse. The most effective goals are specific, measurable, and attainable.

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---