

WEALTH REGENERATION AT RETIREMENT
PLANNING FOR A LIFETIME OF LEADERSHIP

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Worksheet 2: Balance Sheet for Human Capital

Date:

	Assets (+)	Liabilities (-)	Comments/Actions
Well-Being			
Health			
Peace of Mind			
Lifestyle			
Learning/Growth			
Relationships			
Spouse or Partner			
Immediate Family			
Extended Family			
Friends			
Business Colleagues			
Fulfillment			
Work			
Creativity			
Community			
Philanthropy			
Politics			
Legacy			
Immediate Family			
Extended Family			
Friends			
Community			
Profession/Business			
Politics			
TOTALS:			

Directions:

- Use a straightforward plus or minus system to score.
- Plus signs go in the Assets column while minus signs go in the Liability column.
- On some things you may use multiple plus signs or minus signs. On others you may choose to leave it blank as not applicable.
- Add any item that matters to you.
- Do you have more pluses than minuses?