



LIFE CHANGING COUPLES GOAL SETTING WEEKEND GUIDE

Dynamik Consulting
with Katie Wynn

dynamikconsulting.com

Get Ready!



This retreat is life-changing! If you do it once, it will be great. If you do it consistently, it will TRANSFORM your lives. How it started for us: Rob had just started Wynn Capital, we had three young kids, I was working part-time, we were in quite a bit of debt, we were somewhere between surviving and drowning. I read a book called *The One Thing*, read a chapter aloud to Rob on the way home from the beach, and that chapter inspired us to get out of debt, a life-changing experience. We realized if we applied the concepts of that book to all areas of our life, we could break free from living according to the status quo and instead live an extraordinary life...TOGETHER, incorporating each of our hopes and dreams. Extraordinary according to what WE DEFINE as extraordinary.

It's hard to figure out what you define as extraordinary unless you invest the time. This guide is an invitation to make the time. Inside are questions and suggestions for how to get started as well as what's worked for us. I encourage you to make it your own.

Sincerely,

Katie Wynn



Checklist



For People who Prefer Pen and Paper

1. Print 2 copies of this Guide
2. A fresh notebook dedicated to this conversation that you will refer to year after year.
3. Pens or Pencils
4. Download and make a copy of the Financial Planning Workbook.
5. Your current calendaring system.
6. A positive attitude & an open mind!

For my Digital Folks

1. Make sure to have this guide downloaded.
2. Don't forget your chargers!
3. Make a pact that this will be the only window you have open!
4. I suggest copying the PDF and putting it into a Word Doc for easy note-taking!
5. Download and make a copy of the Financial Planning Workbook.
6. Print 2 copies of pages 6 & 15
7. A positive attitude & an open mind!

Keys to the Weekend

1 PLACE

Pick a place away from home that doesn't require too much travel time. Pick a place that has space to walk and talk. You aren't going to be sitting in a hotel room having these conversations. And you'll need distractions. Rob and I enjoy a place like Greenville...easy to navigate, a nice river to walk along/sit and watch and talk, good coffee shops, and common eating areas where you can sit for a while and hammer through whatever topic you're discussing!

2 PATIENCE

Do not let perfection be your enemy. The first time we attempted this weekend, two of our three kids were sick. We only went for a night. We got there and realized we had nothing to write on, so we bought a \$4 notebook from Walgreens. One year, I'm pretty sure we both had Covid, so we slept a lot, but we still got more done than had we not gone at all. One of you is going to think of a million reasons why you can't go...I promise it's worth it. Book the weekend now!

3 PACE

If one of you needs a break, let the break happen. Get up and walk to the next spot. Try something new. One year, we spontaneously rode the Bird scooter things all over San Antonio and eventually landed in our next spot. Our friends stopped in a nail salon on one of their breaks one year and got side-by-side pedicures, a first for him. The year we had Covid, we slept for 2 hours. The day will not be perfect or perfectly planned...that is ok and part of the fun.

4 PASSIONS

A note about DREAMING AND acknowledging your passions: This is my favorite thing about these weekends. Every year, something comes to the surface. Something fun. One year, we acknowledged that we owned our businesses and thus had the freedom to live somewhere else during the summer if we really wanted to. We then made a plan to rent an Airbnb for 3 weeks in July and work remotely. We started small and have plans to expand in years to come. We TREASURE that time and can't wait for what's to come.

Another year, I told Rob that I wanted to GO FOR IT with my business. He was always telling me not to carry such a financial burden/not to worry about work. I expressed that I wanted to go for it because it was fun and energizing, etc, not because it was a burden. So we changed our script. Very meaningful for me.

Those dreams didn't come from any direct answer to any of the questions. They came out of the conversations. Your dreams will look very different from ours, but the DREAMS and living according to your passions are what make life meaningful.

Keys to the Weekend

5 PRE-WORK

If you really want to set yourself up for success, consider the fact that it's very helpful if you have a common language or common framework to discuss these two things:

1

You're going to be talking about your dreams, your money, your goals, your parenting...great stuff, but hard topics. It's helpful if you have a baseline understanding of how you approach life. THE ENNEAGRAM CAN HELP YOU WITH THIS! If you know each of your Enneagram types, that knowledge will help you be empathetic and understanding toward one another while discussing these big topics. If you don't know yourself according to the Enneagram, read "The Path Between Us," or sign up for one of my Enneagram classes (www.dynamikconsulting.com).

2

Your views, values, and habits with MONEY! Rob and I spend the majority of each of these weekends talking about money. I know that money = security for me. I know that Rob is more risk-prone. We love to dream and plan out our year, we also know that we are committed to staying out of debt, so all of our dreaming is then anchored by our money situation. I always schedule a meeting with Emmett Turner, a partner at Wynn Capital, in December (BEFORE our retreat). I ask him to treat us like we're clients. We review the previous year, I lay out a few big financial commitments/hopes that I see on the horizon, and we map out the path to get there. Rob and I both run our own businesses, so things can get complicated financially. I find that the more pre-work we do around money, then by the time we get to our retreat, we can dream and plan! Use the Financial Planning Worksheet (emailed separately) to get started. My suggestion would be for one of you to take ownership of this. If you know you're less interested, get interested when your spouse shares it with you. It's important.

Itinerary

FRIDAY HAVE A NICE DINNER

Share your highs and lows from the year. Share your accomplishments. Celebrate any recent or upcoming milestones. If you've set goals before, review your goals and notes from last year.

*Optional: Use this chart to help you with this conversation.
Print two copies you can both fill it out.
Fill it out separately at dinner and then compare answers. It's more fun that way!*

Year	
Symbolic Title (one word to capture the essence of this past year)	
Family Milestones	
Work Milestones	
Key Struggle	
Key Triumph	
Lesson	

Itinerary

SATURDAY

MORNING

GO TIME

Pack up your guide, notebook, and/or laptop and walk to breakfast/coffee, find a good spot to sit for a while, and get started – it's time to review the important areas of your life.

Go through the questions (found on pages 9 - 15) and ask each other what is working well and not working well in each of these areas. Use the questions for inspiration. Some might not be applicable. Some of the questions will be harder to answer than others. Do not rush through those. Let the hard conversations happen.

The order in which we discuss the topics changes every year, but we always start with spirituality and money.

SATURDAY

AFTERNOON

SET YOUR GOALS FOR THE YEAR

Set 1 – 3 goals in the areas you discussed.

Continue going over the questions and begin setting goals!

For example, one year we decided that we wanted to make our home feel like a sanctuary, meaning we needed new furniture and a declutter plan. We then set a preliminary budget for what we wanted to buy, and we acknowledged that much of our profits for the upcoming year were going towards furniture. The next year I wanted to scale my business by a lot and decided to put all profits towards business things, nothing towards our home. The pie slices do not need to be equal every year. The key is gaining clarity TOGETHER on where you're focusing and how you're financially contributing to your goals.

SATURDAY

EVENING

PLAN THE FUN STUFF

Time block your vacations for the year. Get your calendar out and put the vacations on the calendar, even if they are tentative. You're going to forget that you said you really wanted to take your kids camping or that you really wanted to go to the beach with friends once this summer or that you really wanted to _____ (you fill in the blank). Put it on the calendar. Figure out the details later.

Itinerary

SUNDAY MORNING

TIE UP LOOSE ENDS

Discuss any lingering thoughts/things you want to reiterate/go back to. Rob is usually tapped out at this point, so I don't push it. We usually try to leave by lunch to get back in time to get ready for the week.

A note about coming home: Rob and I struggle with this every year!! I'm literally on cloud 9 and want to solidify all that we talked about. He usually needs a week to decompress from all the talking. I've had to learn to be patient and trust that we'll get to it all, just not in the first week after the retreat. If this happens to y'all, just wanted you to know you're not alone!

The Questions

The questions and categories listed on this questionnaire are not meant to be all-inclusive. Don't try to pinpoint any "right" or "wrong" answers; rather, use this document as a catalog of ideas to jump-start your goal setting process and help you understand and appreciate your partner's thoughts and priorities.

SPIRITUAL

1. What spiritual practices do we want to prioritize?
2. Who is a spiritual mentor I'm currently paying attention to (author or real figure in my life)? What am I currently learning from them?
3. What doubts am I struggling with?
4. What spiritual disciplines do we want to practice as a family?
5. What do we want to tell our children about God?
6. Who do we want to spend more time and intention serving?

PHYSICAL

1. What's the number one thing that would move the needle on my overall health?
2. Are you still attracted to me physically? What can I do to make myself more attractive to you?
3. What one habit do I want to try to improve upon/incorporate this year to improve my physical health?
4. What hobbies could we spend more time on to increase fun physical activity as a family? How else do we want to increase physical activity as a family?
5. Are there any big physical goals I want to pursue? How much time will that take? Do those goals align with the rest of our life?

The Questions

KEY RELATIONSHIPS

Marriage

1. What do I love and respect about you lately?
2. What do you love and respect about me lately?
3. How have we changed since we got married? Do we feel the freedom to be ourselves within our marriage?
4. Are we meeting each other's emotional needs?
5. Are we meeting each other's intellectual needs?
6. Are we meeting each other's physical needs?
7. How would you describe the direction we're going as a couple?
Where do we see ourselves in 5 years?
8. Are we prioritizing time together as a couple? How could we improve this?
9. What do you NEED from me this year?
10. Do we have fun together? Do we want to prioritize this more?
11. Are we content with the way we are splitting the chore responsibilities in our marriage? Take the real simple chore audit <https://www.realsimple.com/home-organizing/dividing-household-chores>

The Questions

KEY RELATIONSHIPS

Parenting

One note about the parenting section. This can take up your entire time. Don't let it. Try to focus more on your united parenting style instead of each child and all their individual needs. The greatest gift you can give your kids is a healthy marriage.

1. Do we want children? What is our timeline?
2. If we are not able to have biological children, have we thought about the options we are willing to consider
3. If we had to name the three most important character traits we want to develop in our children, what would they be?
4. Does our devotion to our children hamper our relationship with each other?
5. What do we think our children's love languages are?
6. What manners/basic communication skills do we want to ensure we teach our children?
7. Do we have 1 – 2 goals in mind for each child? How might we best communicate those goals?
8. Do we anticipate any big changes or transitions this year for any of our children? How might we best prepare to support them.

The Questions

KEY RELATIONSHIPS

Extended Family

1. Are there any relationships that need repair?
2. Are there any relationships that will need extra time and energy from us this year?
3. Is our devotion to extended family members hindering our devotion to each other?
4. Are we too dependent on our extended family?

Friendships

1. Which friendships do we really enjoy?
2. Which ones are draining?
3. Which friends challenge us in a positive way?
4. Should we entertain more?
5. Is there anyone we'd like to get to know better?
6. Which friendships might need extra attention from us this year?
7. Are there any friendships we need to let go of for the benefit of our marriage?

The Questions

FINANCIAL

1. Go through the Financial Planning Workbook . Make sure you both have a good understanding of your financial situation.
2. Use the exercise on page 16 to evaluate your financial priorities. (Don't forget to print two copies).
3. How do we feel about our financial trajectory?
4. What is our 5-year net worth goal? Do we care equally about that?
5. If we have debt and want to pay it off, what sacrifices are we prepared to make this year to pay off our debt?
6. What are our savings goals?
7. What steps do we need to take to get there?
8. Where do we want to prioritize spending based on our answers to the exercise above?
9. Where are we putting the money that we're saving? Do we need to reorganize our bank accounts?

Job

1. How satisfied are we with our jobs?
2. Do we feel useful in our jobs?
3. Do we get paid enough?
4. What are our individual job aspirations for the year? How will those aspirations impact our family?

The Questions

FINANCIAL

Business

1. Do we want to start a business, collectively or individually? If so, what kind?
2. How are our businesses doing financially?
3. Do we want to create opportunities for passive income?
4. If we have passive income investments, how are they doing?
5. What are the ultimate goals for the businesses?

BONUS QUESTIONS

1. If we had unlimited resources, how would we live?
2. What if we...?
3. What if I....?
4. What if you...?
5. What are the key habits we want to develop as family?
6. What books do we want to read individually or as a family?
7. What are our immediate actions from this weekend? Who is handling what?
8. What vacations do we want to take? Time block them now!

PRIORITIES CHECK LIST

Your financial status and priorities will change throughout your life. Perform this exercise every year, before you settle on a budget. The chart below lists typical expenses. To the right of each item are numbers reflecting a scale of importance from 1 (less important) to 3 (more important) to 5 (most important). Individually mark the number that matches your personal priorities, then compare.

Owning a Home	1	2	3	4	5
Cars	1	2	3	4	5
Savings	1	2	3	4	5
Training/Education	1	2	3	4	5
Having Children/Childrens' Education	1	2	3	4	5
Health Care	1	2	3	4	5
Clothing	1	2	3	4	5
Supporting Relatives	1	2	3	4	5
Travel	1	2	3	4	5
Entertainment	1	2	3	4	5
Cosmetic Goods/Procedures	1	2	3	4	5
Prior Debts	1	2	3	4	5
Pets	1	2	3	4	5
Hobbies	1	2	3	4	5
Electronic Equipment	1	2	3	4	5
Holidays/Celebrations	1	2	3	4	5
Charity	1	2	3	4	5
Fitness	1	2	3	4	5
Passive Income	1	2	3	4	5
Business Development	1	2	3	4	5
Other_____	1	2	3	4	5



Katie Wynn

DYNAMIK
CONSULTING



@DynamikConsultingFirm



@DynamikConsulting



@katie-wynn

Email me at
katie@dynamikconsulting.com. I'd love
to hear how you used the guide!

Katie Wynn