MARK BENNETT

Life Plan 2027

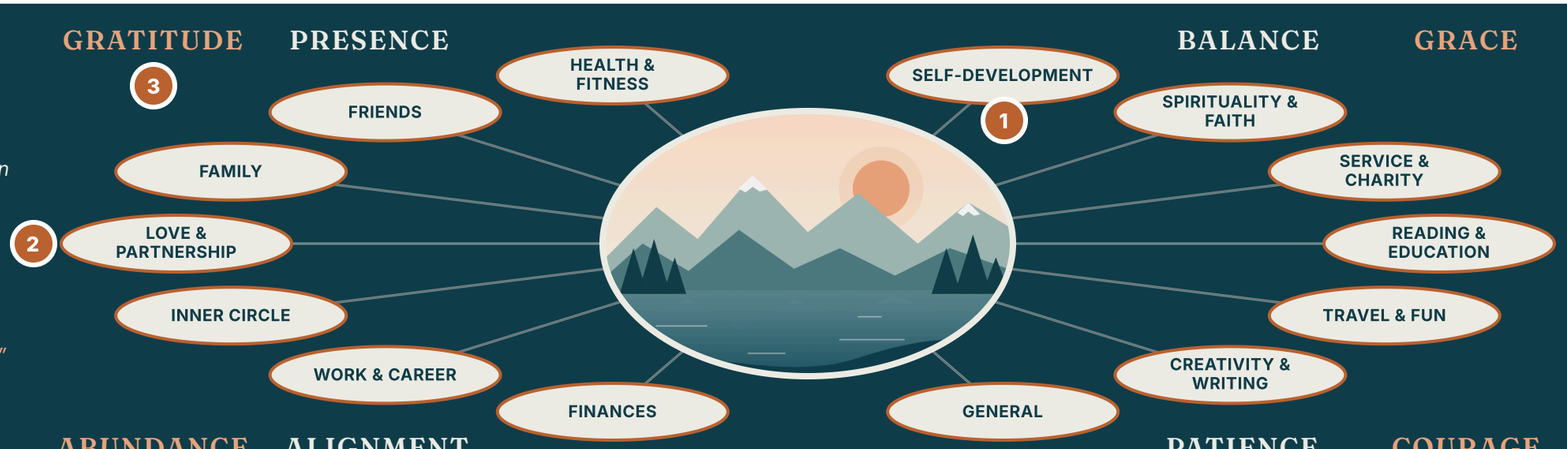
"We suffer more often in imagination than in reality."
— Seneca

"Go confidently in the direction of your dreams. Live the life you have imagined."
— Henry David Thoreau

"The happiness of your life depends upon the quality of your thoughts."
— Marcus Aurelius

"It's not what happens to you, but how you react to it that matters."
— Epictetus

SAMPLE · FICTIONAL



5 General

- Live intentionally — weigh every new commitment before saying yes
- Notice cognitive distortions: catastrophizing, mind-reading, all-or-nothing
- Detached engagement — at work, coaching, and parenting
- Sunday night prep: calendar, workouts, meals, family plans
- Grace over reaction — pause, breathe, then respond
- Listen more than I speak; be thoughtful about what I share
- Model honesty for the kids — own it when I fall short
- Keep family traditions going: holiday letter, birthday breakfasts, July 4th
- Seek out new connections — stay curious about people
- Review this plan with at least 3 trusted people
- Quarterly check-ins on this plan: Jan, Apr, Jul, Oct

HOME:

- Finish the basement storage project
- Re-stain the deck before summer

Reading & Education

- Read 12+ books in 2027 (one a month)
- Mix it up: 6 nonfiction, 4 fiction, 2 biographies
- A book on the nightstand — less phone in bed
- Audiobooks on the commute
- Finish an online leadership course

2026 Books Read (9):

- Man's Search for Meaning
- The Power of Habit
- Switch
- Mindset
- Atomic Habits
- The Happiness Hypothesis
- East of Eden
- The Old Man and the Sea
- Lonesome Dove

Friends

- Monthly lunch or coffee with a friend — keep a running list
- Life Goals Club: quarterly meetups with Greg & Andre
- Annual fishing trip with college roommates
- Reconnect with two friends I've lost touch with
- Host a backyard cookout this summer
- Listen first — resist the urge to fix

Dinner list with Lisa:

- The Garcias
- The Parks
- Sam & Jordan
- Neighbors on Maple Lane

Family

- One-on-one time with each kid every weekend
- Family dinner at the table 5 nights a week
- Apologize and explain when I'm short with the kids
- Twice-a-year family money talk with Emma & Noah
- Traditions: holiday letter, family photo book, Father's Day hike
- Memorial Day weekend at the lake with cousins
- Visit Mom & Dad four times this year
- Family game night on Fridays

EMMA:

- Support her first year of high school
- Driver's ed in the fall

NOAH:

- Try a new summer camp
- Read 20 minutes a day together

Service & Charity

- Volunteer at the food bank monthly (12x)
- Coach Noah's rec basketball team
- Give 5% of income to causes we care about
- December family giving meeting — each of us picks a charity
- Kindness to strangers — notice the energy I bring into a room
- Mentor one new hire at work
- Donate clothes and toys twice a year

Spirituality & Faith

- 10 minutes of morning meditation or prayer, 5 days a week
- Attend services with the family twice a month
- Gratitude journal: three things before bed
- Thoughtful over instinctual
- Reflective over reactive
- Let others' chaos be theirs, not mine
- A quiet reflection day each quarter — walk, journal, no phone

Work & Career

CAREER:

- Hit 110% of the team sales target
- Develop two team members ready for promotion
- Weekly 1:1s with every direct report — no cancellations
- Finish the leadership certificate by June
- Block two hours every Friday to plan and think
- Leave by 5:30 two days a week

SIDE PROJECT:

- Explore a small consulting practice — talk to 3 people who've done it
- Update resume and LinkedIn in Q1

Health & Fitness

- Exercise 5x a week — walking, cycling, yoga, weights
- Strength training 2x a week (even 20 minutes counts)
- Weekly tracker: workouts, sleep, alcohol
- Physical, dental, and eye exams in Q1
- Alcohol-free weeknights
- 7+ hours of sleep — phone charges outside the bedroom
- Sunday meal prep for better weekday lunches
- Run a 10K with Lisa in the fall

2026 Review:

- 180 workouts (~3.5/week) — up from 140 in 2025

6 Travel & Fun

2026 Review:

- Beach week with Lisa's family
- Mountain weekend with friends
- Noah's first big-league ballgame

2027 Targets:

- Family road trip out West — national parks
- Long weekend away, just Lisa and me
- Ski weekend with the kids
- Concert with Emma
- Camping trip with Noah's scout troop

Self-Development

- Learn guitar — 15 minutes a day
- Monthly reflection: what's working, what's not
- Work with a coach on leadership and listening
- Try a meditation class
- News and social media: 30 minutes a day max
- Give two talks at work or in the community
- 12+ books (see Reading)

Love & Partnership

- Date night every other week — alternate who plans
- Morning coffee together before the kids are up
- Support Lisa's master's program — I take two evenings a week
- Quarterly money meeting together (financial statement)
- Weekend away for our 15th anniversary
- Say thank you more — notice the small things
- Plan the summer vacation together in January
- Share and review our Life Plans together

Creativity & Writing

- Write the family holiday letter
- Monthly journal entry: lessons learned
- Build garden beds with the kids
- 2027 family photo book
- Birthday letters to Emma & Noah

Inner Circle

- Lisa
- Greg
- Andre
- Dad
- Sarah (sister)
- Coach Williams (mentor)

TARGETS:

- Share this plan with 4 people by Feb 1
- Quarterly check-in with Greg
- Ask my former manager to review the plan

Finances

- Quarterly money meetings with Lisa
- Emergency fund to 6 months ($39,000)
- Raise 401(k) 2% for the full employer match
- Pay off the Honda loan by mid-2028
- Credit cards paid in full every month
- $100/month to each 529 plan
- Extra $200/month to Lisa's student loans
- Give 5% of income
- Update wills, guardianship, beneficiaries
- Simple monthly budget — track spending
- Teach Emma & Noah a family financial statement

How Mark built his Life Plan page

Sample for a fictional person — use it as a guide, not a script.

1 Your photo

A recent picture that inspires you sits at the center. Mark chose a family hike from last summer. In the template, right-click the oval and choose Change Picture.

2 Your categories

Each oval is a category of life, connected to the photo. They match the column headings below, so renaming a column updates its oval. Mark uses 14; start with whatever matters most to you.

3 Anchor words

Eight words for how Mark wants to live this year. They set the tone for everything below them.

4 Quotes that move you

Quotes, lyrics, poems, or passages that put you in the right frame of mind. Mark picked four classics.

5 The General column

Mindset and rules of engagement: how you want to approach life, not tasks. Mark mixes mantras (“Grace over reaction”) with habits (“Sunday night prep”).

6 Mix goals, mantras, and reviews

Columns can hold goals, affirmations, reminders, lists of people, or a look back at last year. Labels ending in a colon (“2027 Targets:”) organize longer lists.

Where this page fits

The Life Plan page is step four of the guided framework in the book. It works best after you have written your summary and completed a self-assessment or two — those reflections generate the ideas you capture here.

1. Life Plan Cover
2. Written Summary
3. Self-Assessments
4. **The Life Plan Page**
5. Financial Snapshot
6. Tactical Pages
7. Outlook & Audacious Goals
8. Conclusion

Let it flow

Jump between categories as inspiration strikes. It's fine to repeat an idea in two places — areas of life overlap.

Alignment, not a to-do list

Skip the technical detail. Specific strategies belong in your tactical pages; this page is about vision and direction.

Make it visible

Print it on 11×17 paper, share it with four or five trusted people, and revisit it every quarter.

Your turn

Download the blank Life Plan template, add your photo, rename the categories to fit your life, and start filling in the columns. Don't aim for perfection — inspire yourself.

Life Plan Template · Excel