

The Lovelight Stories[®]

PODCAST

Ep: 23 | The Power of Creating a Life Plan and What It Can Do For You with Kayla Clark | Premier Performance Advising | SHOW TRANSCRIPT

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00:01.28

lovelightstories

Kayla thank you for joining me on the lovelight stories podcast today I am so excited to have you here.

00:06.47

Kayla Clark

Hi Stephanie thank you so much for having me. It's an honor.

00:12.71

lovelightstories

This episode and discussion with you is one that I've wanted to do well before I even started this show. Um because we have worked together. Ah for some time you've actually been one of our family advisors and we've worked through. Life planning. Um and we're going to get into life planning more as we roll into this conversation and this is going to be a little bit different of a conversation actually because we're going. It's less story focused and more of a thought leader personal transformation. Um topic today and. So before we get into all of that I want to just allow yourself to share what you do for families how you help them all of that.

01:01.00

Kayla Clark

Okay, well I that's a lot. Thank you? Um I really honestly stumbled into this work I met Justin Anderson my colleague and the owner of premier performance advising through my next door neighbor I was. Um, just kind of talking over the fence one day and my next-door neighbor owned his own small business and I was kind of looking to get back into the workforce after taking some time away to be a new mom and that was how I met Justin They shared an office space together and he. Like hey I need some help with my own business and getting it started and the rest is history as they say so really I started out just doing supportive type of junior advisor or business advising type of work where I was doing more work on the backend to help. Prepare materials. Do research things that were in support of the clients but not necessarily working directly with them or being that lead advisor in the room but I got introduced to you and your family pretty early on and. Um, you all really welcomed me right into the fold I remember the very first sort of family retreat set of family meetings that I came to with you all and I just quietly took a seat by the side of the room or at the side of the room and your dad turned around and said we have.

02:28.24

Kayla Clark

Someone else here please join the table and I was very surprised but um, it was such a great experience and I knew right? then and there that getting to know you all and seeing what love and care that you had for each other I just was really interested in in learning more and so. Work that I do now is really wide ranging I work with a lot of families, family business owners families of wealth or just individuals and groups of people that want to just work together better and that really depends for them in terms of what that looks like a lot of times with the. Business consulting I'm doing work around governance planning development but a lot of times it includes personal development plans and particularly what we've sort of coined with you All is the life planning process and I found.

03:21.26

lovelightstories

Yes.

03:24.24

Kayla Clark

Yeah,, but this is an incredibly transformative experience for people individually, but also as families and I've just seen it be so impactful in so many ways and I'll be quiet there I would love to hear knowing that you've been doing this for so many years what has been. You know your your biggest takeaway. What's been your experience with this and and the outcome or the impact it's had for you.

03:50.45

lovelightstories

Yes, well the impact has been incredible and first of all I'd like to say that we have been so blessed to have you come alongside us so early in the process and um I just want to clarify that primarily we work with you as a family. Um.

04:08.80

lovelightstories

To focus on like that family cohesion aspect. Um and we have a family foundation and we've been most recently working on some of those processes and how do we? um, get more clear and definitive on how we want to support organizations and nonprofits around the world and. Everything of that sort and so it's been just really great to have you as an advisor and then the personal development we've done so much with you over the years um of understanding ourselves and how we can better communicate as a family in the work that we're doing around philanthropy and. Um, some estate planning and stuff and so anyway, um, it's it's been an all-encompassing thing and and today we're here mostly to talk about the life planning. Um and so to answer your question. Um life planning. It's so crazy I counted the years and it's been fourteen years at the time of this recording that.

05:05.12

lovelightstories

I personally have been doing life planning I was introduced to it through you guys and um, my parents who were kind of the catalyst of getting us me and my siblings um involved in this and it's really kind of evolved over time. Um. You know it was very very new at the time like when I

started talking about it with people. Um, just off the cup or with my friends and stuff I always got the question like what are you talking about? What's life planning and I think now it's it's actually. More common of a thing and and more people know what it is um but it can be very varied too. So I think we're going to get into that probably as well of how it's it's not just 1 definitive thing. But as time has unfolded. It has been um. Something that has really rooted myself and my husband to give us a compass for our life and where we want to go? Um, and we found it to be a very flexible process too which a lot of people. Um, initially think may not be the case because you're.

06:12.62

lovelightstories

Planning your life but we can get more into that as well. Um later. But yeah, it's it's just had a huge impact. Um, and um before we move forward actually Kayla I would like to hear from you what life planning is and why why. Why do life planning like from your perspective. What is it.

06:36.43

Kayla Clark

Oh okay, yeah, Um, so I would say life planning is as you mentioned it's a very all-encompassing process and as I think about it. It's freely about finding that compass. So How do I want to live my life. What does it mean. For me to be a better version of myself. It's about incorporating intentionality in not only your day-to-day practices. But in who you are as a person and where you want to go in your life and so when I think about life planning as a tool. And how I use it with families. It can be used in a lot of different ways again just personal development sometimes that includes professional development but other times we think about how do we use this to help us be intentional with our values am I living with my values. Do I have my own personal. You know mission or. Vision or Credo as as you have I think in yours or you had at one point I Love that and so I look at life planning as a means to really be thoughtful and intentional and kind of peel back. The reason to why we we want certain things and it's not necessarily.

07:50.00

Kayla Clark

Sort of this I guess oh I want this diamond ring I want to go on this huge trip I want to I want I want I want but more about why and I think that's one of the things that we get really great with with life planning and and what you've done really? well is to say. Who do I want to be but what does that really mean and at the end of the day if I if I am who that person is or if I'm working on that life plan if I'm working through those goals if I'm being intentional if I'm reflecting and being planful and thoughtful. What does that mean for the impact that I have on the world and the legacy that I want to live and I want to leave behind one of the things that I thought Stephanie that was so unique that you did and I want to ask you about it actually is you wrote a eulogy in your life.

08:40.46

lovelightstories

Um, yes.

08:43.25

Kayla Clark

Plan I had never seen or heard of it before but I mean you think about what do people say about you once you're once you're gone when you leave What do you leave behind and so to that I would ask how did you come up with that idea.

08:58.48

lovelightstories

Yeah I was going to say that is one of the most powerful exercises in um, a book called living forward written by Michael Hyatt and Daniel Harcoy and um before we're done with this conversation. You're going to hear about this book multiple times. I can't stop talking about it I've first encountered it about six years ago and it is actually one of the biggest things that kind of transformed my life planning process because as I said I've been doing this for 14 years and it wasn't until I've read this book and really um.

09:32.63

lovelightstories

Went through kind of this blueprint of exercises in template and and things um that this book includes that I really something clicked it clicked very differently and my husband and I both did this at the same time together and ever since like literally I was telling my husband we're going to do this.

09:35.61

Kayla Clark

Um.

09:52.40

lovelightstories

This recording of the interview and he said life hunting like literally is life changing and um anyway I credit a lot of that to that book. But the eulogy I found that it it peels back the layers so quickly of who you are and helps you get to your purpose in the core and why.

10:09.33

Kayla Clark

Yeah.

10:11.83

lovelightstories

You're on this earth and when you think about like when I'm gone What what do I Want to have said about the legacy of my life like what do I want that to be I mean when you really think about that and reflect on that it um it humbles you very quickly and it helps you really get. Down to the core of who you want to be and then you can build like your life around that and so that's why I include that in my life plan because it's such a grounding practice and I want to always remember like what I'm striving for and who I'm.

10:37.83

Kayla Clark

Be nice.

10:49.93

lovelightstories

Seeking to be basically.

10:50.26

Kayla Clark

Yeah, and I think that's that's a great point right? It's this living forward concept. But what I love about it is it I think they say you know start with the end in mind I think that's great and I also think start with wherever your energy is right? think about what motivates you? what? What connects you. To the life and to the earth and to the world and everything that you want to be connected to I think there are so many great resources out there whether that's other books whether it's you know productivity planners guided Journals I think you had mentioned you were putting together a life planning reflection journal.

11:27.95

lovelightstories

Um, yes.

11:29.39

Kayla Clark

I Love all of that and I think that it is so important and critical to the life planning process of really starting at the core of who you are what is most valuable or what what do I value most and how do those values shape my behaviors. How do they help me make decisions.

11:36.57

lovelightstories

Yes.

11:48.32

Kayla Clark

How did they impact how I show up and how I interact with others being very clear I think is something that's that's really important to this process because it can help anchor us, especially maybe when we're hitting a slump. Maybe when we're not. Getting to those goals that we hoped to achieve as quickly as we thought we might being able to come back to that core of who you are and your sort of your purpose and the meaning and the legacy you want to leave is really really grounding.

12:20.45

lovelightstories

Yes, yes, and and some of the questions that I always like to um, reflect on that I think this life planning process really pulls out of us are things like who am I Who do I want to be how do I want to live my life. What do I want my life to look like. And those are kind of hard questions to answer off the cuff but it's it's this this process of going through all of this that you kind of you can come to those those answers and they rise to the surface and I think starting there at the core. Is so powerful because then you can begin to build the actual tactical things and priorities in your life to make that make your life reflect that and it's always going to be I mean very flexible over Time. It's going to change over time.

13:12.56

Kayla Clark

No.

13:14.79

lovelightstories

But again those core things about who you are and how you want to live your life often. Don't really change. It's just the circumstances of of your season that you're in might and so um, again, it's just like really really grounding.

13:29.38

Kayla Clark

Yeah I mean it really.. It's what does it mean? What does it matter I Really love the idea and to that point I think there are so many different aspects along the way Once you've created your life plan and you are already teamed that up really well. Are really Important. So I would love if you're willing to speak to the core components of what you've included in your life plan and and why you've done that.

13:57.14

lovelightstories

Yeah, um I I started with um the core priorities are just like areas of life. Um, which are I don't have it in front of me but the big things are like productive work. Family and friend time. Um Faith um, personal development um trying to think the other things but these these facets of your life that I always keep those as kind of like the big facets of life.

14:24.67

Kayla Clark

Citizen.

14:31.88

lovelightstories

And I order them at the end of my life planning process I end up ordering them in in importance and the order of them changes every year surprisingly or not surprisingly just because circumstances change some years I'm like focusing way too much on work and I'm level setting and saying you know.

14:39.94

Kayla Clark

The.

14:51.58

lovelightstories

I Really need more rest and reflection and you know some fun time. Um, or yeah, yes, right right? Yes, that's going to be an interesting one for me. It'll be a transition.

14:58.94

Kayla Clark

Especially I think with the baby on the way you might have to take a little bit of a harder look at that work life balance. Ah.

15:11.30

lovelightstories

Like like for everyone it is but um, but the way that I end up prioritizing them and I do it last is because once I can start again again with my core and and making sure that's solid and really getting grounded in that. And then looking at the things ahead in the coming year of things I would like to accomplish and that's getting into the goal part which is very specific to that time

and place and um building that out and what that looks like and then and then I'm able to prioritize.

15:33.60

Kayla Clark

In.

15:48.28

lovelightstories

How I can categorize these areas of my life and I always suggest only focusing on like a few key areas. Um and big goals when you actually get to the goal part because it allows you to really focus and be able to um, find that. Purpose in what you're doing and and it also makes sure that you get it done because it's very clear at the end of your planning time. Um, and so anyway, that's that's how I go about some of it.

16:20.82

Kayla Clark

I think what what I hear you speaking to is this concept that we tend to call the pillars of a balanced life and really, it's just this holistic idea that's often used actually in more wellness and self-help context but I find it impactful. In in this context as well and basically it's it's thinking about all of the different facets of your life that sort of that are the pieces of the pie. You know they contribute to your overall well-being and I think you nailed it right? They typically include things like physical and emotional. Well-being spiritual fulfillment and fate. You know, personal or intellectual growth relationships or social connections for some people it. It might be their job or their occupational stability finances or financial stability. It's all of these different things and if we were to to put them sort of in this column. Separately each and say okay if I were to stack them up next to each other How am I attending to them and what I love that you pointed out Stephanie is that you said it changes and that's okay, whether that's life coming at you and saying hey nope we got to redirect and.

17:30.31

lovelightstories

Um.

17:36.77

Kayla Clark

We need to spend more time here or there or whether it's where you're at personally and saying hey you know what I want to focus more on. Maybe my physical well-being or my emotional well-being and I'm going to give that a little bit more attention and I'm going to boost up that pillar a little bit more but really the idea.

17:48.83

lovelightstories

Yes.

17:55.21

Kayla Clark

You're getting at is saying okay I want to start with the core of who I am and knowing the impact that I want to leave or the legacy that I want to leave behind now what are the facets of that. How do I How does that look in my life.

18:08.30

lovelightstories

Yes, yes, and I love that you brought up again that it it can change and mold and everything because one of the most common things when I bring up life planning and it was very much so at the very beginning when no one knew anything about it. They were like. Why Why would you plan out your whole life because it's just going to change Anyway, it doesn't that doesn't make sense and what I like to say is that it's really a guide.. It's not a definitive plan. It allows you to live fully in the present moment while still maintaining that overall compass for your life.

18:37.99

Kayla Clark

And.

18:43.31

lovelightstories

And so if you have that overall compass and direction knowing the core of who you are and then allowing yourself the flexibility to change and morph within that and around that core purpose as time.

18:55.22

Kayla Clark

Community.

18:57.45

lovelightstories

Goes On. You're no longer. You're not Drifting. You're being intentional in the present Moment. You're always intentional and that's that's the thing that I think is is such a powerful distinction between life planning and just goal-setting. Um, if we don't. Tie our goals to what's really deeply Meaningful. It's not as powerful and inspiring to actually reach those goals. We don't really know why we're reaching those goals or or maybe we have a ah sense but it's not tied to something deep within us. That is um, more motivating. Um, so anyway I think it's just that's a really big part of helping to understand the power of life planning and it's really not about living. In the future. It's It's intentionally living in that present moment while keeping the future in mind and then living your best life every day.

19:57.21

Kayla Clark

I love that and I don't know let me just backtrack that one. Um I love that you talked about it not being fixed and when people ask why would you plan out your whole life. I love that you were talking earlier about how it changes you know life has seasons and when we think about you know activities we have our kids do in school they put together time capsules I bet if you were to go back Stephanie to five years ago ten years ago Fourteen years ago your very first life plan. You might have had very different goals. You might have envisioned things very differently in your life. But how fun is that to open up that time capsule and to go back and to say wow look how much I've grown look how far I've come maybe it wasn't what I thought then but what a gift. Be where I am today and that reflection and that gratitude I think can just be so meaningful.

20:54.83

lovelightstories

Yes, and knowing that you've gotten to this place where you are today from intentionality. It doesn't feel like you've lost those however, many years those 14 years for me when I started this.

It doesn't feel like I've been drifting through life and allowing life to just take me places. Um yet it of course looks different but I will say like the core of the way that that my actual life has unfolded is is different but the core of.

21:14.86
Kayla Clark
The.

21:30.36
lovelightstories
What it surrounds itself around is still similar like helping others. Um and using these certain skills and gifts that um that I identified back then I'm still doing that but it just looks like a different way.

21:46.17
Kayla Clark
Well and and there's often a ah study that is cited from Dr Gale Matthews who did research on goal setting and and. I'm sure everyone's heard this one but participants they found who wrote down their goals on a regular basis were up to 42% more likely to achieve their goals when they wrote them down just versus not writing them. So just again that intentional act of saying this is what I want to do but having that flexibility in mind.

22:04.34
lovelightstories
He.

22:15.10
Kayla Clark
That might that might say okay maybe this isn't working for me or maybe I thought this was but I've learned more and this isn't the place where I want to be. We always say when we we take a look at you know trying to achieve something or setting goals that reflective piece of you know what went? Well. What's worth improving and not doing that with judgment or criticism but just discernment Shizad shamin is really great. He wrote a book called positive intelligence and he's a wonderful coach and he talks about having that discernment and just being able to say what is this. Not judging not labeling it good or bad. But here's what it is and when we look at that in the context of life Planning. It's being able to say Okay, if we hit Maybe that's a win. But if we miss we learn and either way we are still stepping. Forward.

23:07.59
lovelightstories
Yes, Yes I love that and and again when you mentioned the goals and how important and energizing it is to hit those goals again like if you just write your goals Down. It's not as powerful as if you've. Started from a place of purpose and intentionality and reaching deep into that core and then connecting those goals to that core it gives you that confidence and clarity around really your biggest dreams and and they actually feel purposeful and attainable and in my experience.

23:28.41
Kayla Clark
Excellent.

23:36.30

Kayla Clark
Disney.

23:46.68

lovelightstories

Almost my husband always says too. He's like it's amazing how we do this life planning and the next year we come back and review that life plan before we begin our next one. It's amazing. How much we've actually accomplished on that and oftentimes. It's not even like we're tracking.

24:01.41

Kayla Clark
Any.

24:06.65

lovelightstories

Like I do try to track it and review it quarterly but but we're not often like checking these goals off like they're so rooted and connected to the core of who we are and who we want to be and like purposefully designed that they just.

24:09.25

Kayla Clark
Ah, pc.

24:24.54

lovelightstories

Tend to happen because they're part of you and that's honestly I think one of the biggest distinctions that I've come to find in actually giving power to these goals that we ultimately want to reach it's it's it's.

24:24.61

Kayla Clark
In.

24:41.83

lovelightstories

It's amazing how it happens. Yes.

24:41.87

Kayla Clark

Yeah, that connection. It's Funny. You're hitting sort of on that core of what we tend to use as our foundation. It's a psychological theory called Self-determination theory and I'm not a psychologist so I can only explain it in simple terms. But you're hitting it. It's basically the arc. Motivation so autonomy having that control over your actions and your choices relatedness feeling connected and connecting to others with your goal and competence feeling capable feeling effective feeling like you can do it and get it done. Those are all incredibly important for for not just. Setting or achieving goals. But what you're getting to with life planning which is going Beyond goals and how do I Thrive How do I you know create and grow and tend to a garden that develops in a way that nourishes me and who I am and nourishes my soul and my life and it might be that. You know we can go without 1 or 2 of those things. It might be that we might not have the perfect soil but we might not also thrive and so when you talk about including others and that connection it is so critical and I think that it's not only important just for the well-being.

But sharing in it Together. You know, having having a garden club or whatever that might be but but it also offers a level of accountability and I think that that is another piece of the life planning process that can be really helpful is an accountability partner and in some ways I think earlier on.

26:00.52

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M.

26:17.41

Kayla Clark

That was how we were supporting you all in your journeys and in ah in each of your life planning processes. We built in more regular check-ins and again it wasn't with the idea of did we check all the boxes did we get it done. Did we do it at one hundred and ten percent but

26:23.10

lovelightstories

Yes.

26:37.40

Kayla Clark

Really again, just peeling back the onion and saying okay where are we at how did we do if if you felt differently today. How might you show up? What are the talents that you can focus on where have you come or where have you gone how far have you gone. Let's look at all of that instead of maybe the shortcomings or where we're not just quite yet.

26:56.34

lovelightstories

Yes, yes I love that because that's again getting at that intentionality piece of intentionally living and not judging yourself or shaming yourself for what you're not completing which.

27:09.65

Kayla Clark

In.

27:11.21

lovelightstories

I Think a goal list on its own can tend to do you can say I'm behind I didn't get everything done I'm not meeting my goals I fell off the band wagon whoops that one's gone not going to ah try that one anymore. It's it's it. It doesn't the life planning in that context like you were just describing. Um. Takes away all of all of that negativity and instead just infuses with that energy of like how is life going and how can I make tweaks and um Wow look I actually got this done and that's really empowering and um, it's just a really beautiful process.

27:46.16

Kayla Clark

Well and and that's 1 thing too as we think about. It's not just goals whether it's outcome goals or process goals. But it's being intentional about what it's going to take to get there. You know people like to use smart goals or other. You know, different types of processes to help them with it or that can be helpful tool to support life planning but 1 of the things that that I've seen you do so well in your life plan and this process around checking in is the support. And and saying okay here's what I want to get to here's who I want to be here's what I want to do that's going to be

required and not just of me but what asks might I need to make who might I need to ask for help or lean on to be able to do this because then we take a look and we. Say okay, maybe that's you know the quarterly review or the review that you and sam do now at the end of each year before you start your next life plan. It might be okay, these were the things that I needed to get it done and did that happen or didn't it. That's that's separate what I'm looking at is gosh. did I did I not really be intentional about how much I I might have needed to devote more time energy resources or or whatever it might have been to be more successful in this area or to accomplish this thing and with where I met now.

29:11.56

Kayla Clark

How has that changed What have I learned what do I need to do differently.

29:16.13

lovelightstories

Yes, I'm really glad you brought that up because that is a huge part of it as well is is making sure your environment and those you surround yourself with are setting you up for success and actually living out who you want to be and um. It. It takes some trial and error too I think and one of the things too when you talk about the support of others around you which we can transition into this soon. Um, if we'd like but it's one of my tips and tricks really of the life planning process is when you're.

29:50.00

Kayla Clark

Is any.

29:53.47

lovelightstories

Once once you've created this life plan or thought through gone through this process. Um, not to keep it to yourself but to share it with those that it's going to influence and or affect in your life. So for me right now. It's my husband and so we actually um. Part of our life planning process at the end of it. We schedule time to sit down. Actually we're usually not sitting down we um are walking on the beach in Amelia island Florida which we'll get to um, it's another one of my. Tricks or things that I really find is super helpful in doing this process is to get away. Um, ah, but um, we we tend to take the last day of our time away. Um and sharing it with each other and really talking about our.

30:30.31

Kayla Clark

I.

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lovelightstories

Individual dreams and everything and making sure that we are supported by each other because some of our goals and dreams may not be a fit for our family or for each other in this particular moment and maybe we have to ah adjust and talk about how we can tweak them. Or on the flip side just sharing them allows us to really support each other and advocate for each other um in those moments of daily life where you know I say Sam I really want to take time to to do this today and he will know why because. We've talked about it and the importance that it has for me and so it's just a really great way to create alignment and better communication and connection too. We found is it's been a really helpful thing for our relationship. Overall.

31:34.16

Kayla Clark

Yes I love that and while I myself as the avid listmaker constantly writing them down. Whatever my goals are things to do in journals and scratch paper on other list. Pads. I have lists that tell me to reference other lists I think what you're getting to is taking the time to do it and really sort of flesh out that core of the life plan in a very meaningful and intentional way and. Again I think that you can do this in a lot of different ways. What you have found and what we tend to encourage is get away from your day to day a little bit get away from maybe the usual scenery. Don't answer your phone or all of the text messages or the work emails or whatever that might be. I love the idea of incorporating nature or being in a space that really lights you up and gives you good energy that is really important to be able to feel like you can take the time and the energy and just commit that to your process being in a space that. Maybe is really important to you for 1 reason or another whether that's the beach and maybe it was ah a first date or a honeymoon or I like to go up north I love spending time on the north shore in Minnesota and walking around in the woods and being on lake superior that to me.

33:05.69

Kayla Clark

That's where I do a lot of my reflection and and have conversations around who do I want to be and and what does that look like for you know again, not just the year but long term.

33:15.62

lovelightstories

Yes, yes, and you mentioned getting away from your phone and email and all of those things and it is really critical I have found I would highly encourage people who want to try this life planning process. Are creating a life plan which by the way can look so many different ways which maybe we'll get into in a moment too. Kayla just just tactically like how do you begin that and everything. Um, but I want to touch on this this getting away thing. It's so powerful that if you can get away I I would. Not start your life planning process until you get away. But if you can't you can still do it at home. Um, but I I found um during the covid nineteen pandemic Sam and I didn't get away and we weren't able to and it was really the only year that we weren't and it took me I think literally four or five days to but this together on my couch I was so unmotivated I was exhausted it just was so different versus we take about two and a half to three days um we drive down to Amelia Island Florida for us. It's like a four or five hour drive and. Just being away from all distractions. You don't have to cook you don't have these things laying on your desk these lists that you say oh well I'll just you know I'm going to go get the mail quick and I'll go through the mail or all these things it happens when you're home. But when you get away it really does we call it a life planning retreat.

34:47.40

Kayla Clark

Remember.

34:48.35

lovelightstories

And it really does feel like a retreat and we are there solely to focus on ourselves and what we need as a person our core needs and beliefs desires and then um, we couple that with getting more tactical as the time goes on. But you know we're surrounded by the ocean and we sit out on the deck and we hear the waves and then we take a break and go for a walk and talk about some of the things we're working on and then we go to dinner at night and it's a very very

different thing and we come back fully rejuvenated too. It's just incredible i. I'll say share really quickly the first year that we actually did this? Um, where we went to Amelia Island got away on our own. It was the first year we've read the living forward book I was at work and I got I was so sick somehow I got some cold. And I was just really run down and we had this life planning weekend planned and I was just kind of burnt out I was taking on more at work covering for someone part of different committees I was working on a random video project that was outside of my scope of work and all these things and. It made me sick because I was so stressed out and working so much and my boss said just go home. Take the rest of the day pack for your weekend and come back on Tuesday and so that's what I did and literally the first day I was sick but by the end of that day and the next morning like.

36:20.69

lovelightstories

I was completely better and my head was clear and I felt I actually felt alive again because I I was really at a kind of ah a low place I was feeling burned out in everything and I was like you know I have the power and control to.

36:31.66

Kayla Clark

Be.

36:40.22

lovelightstories

Lead my life in the way that I want and I can make these tweaks at work I can ask for this I can make this more sustainable I can change how I rest at home and literally since then my. Entire view on life planning has changed so much because I saw like how it literally made me physically better.

37:02.50

Kayla Clark

Yeah, that that psychological and that physical energy can be a huge boost and what I love about what what you're talking about with your life plan is that it's again going back to this idea that it's not necessarily just for 1 person. See you and Sam using this as a tool to deepen your relationship and I think that can be really a wonderful gift and and a great outcome that might be unexpected as well because you're taking the time to do something together and to come together and say hey here's what I'm at here's what I've learned. Here's who I want to be these are the things that I want to do and I want to do together with you or I need your help to be able to do all of those things when we're having the conversation with those people who are most important to us in our lives. Whether that's a spouse or a partner our parents our siblings a friend.

37:46.44

lovelightstories

Yes.

37:58.67

Kayla Clark

It can really really make a huge difference and what I what I hear you getting to is this idea not just about being intentional with your life plan but being playful with your life planning process and that retreat and they do want to you know, just emphasize the importance of this is. Just a weekend getaway this isn't an O. We're going to go to the beach and we're gonna have a good time and we're we're gonna go for walks and that's our life plan. Um, no, it's it's so much deeper

than that and that's something that I do want to talk about a little bit if you're open to is what does your process look like and.

38:27.84

lovelightstories

Um.

38:32.88

lovelightstories

Sure, go ahead.

38:37.80

Kayla Clark

I can share how we tend to maybe tee it up or or different suggestions that we have but are there intentional things or sort of agenda items that you incorporate into your weekend ret retreat your process.

38:51.36

lovelightstories

Yes I love that question because now we're getting into more of the tactical things of how do I do this? How do I begin this life planning process and I think as listeners will find by the end of this conversation. There's no one-size fits-all it can be very fluid.

39:06.53

Kayla Clark

A.

39:10.33

lovelightstories

Um, and I'll share just the things that I've learned that have worked for myself as well as my husband and then like you said you you have other things as an advisor who works with families and individuals on this and and other tips and tricks that work for people but um for me. First of all I actually have learned to prep before I go. Um and this is not getting into my life planning not into the reflection piece yet or anything but I've found that if I can bring some tactical inputs to what I ultimately want to get out of the process when I'm done.

39:29.89

Kayla Clark

A.

39:47.32

lovelightstories

It allows me more time to actually do the hard work or actually the more enjoyable work if I'm honest of the reflection and the the core needs and the goal setting and everything we talked about when we when we get there to our life planning retreat. So some of the things I prep beforehand is our budget like. What I know our budget to be um for the coming year and it's usually not fleshed out because our life planning like our goals and things on our life plan inform our budget as well. But just as best the knowledge that I have before I go we prepare that and ahead of time. As well as like any vacation time that we have or vacations that are already scheduled and then business and work priorities that I already know about um and so those can be kind of plugged in to the overall life plan. But again those are very tactical details. Um, and

they're really not that important. But at the end of the process I want to have this picture of what my plan for the year um will hopefully look like and so I do that beforehand. It saves me a lot of time and I actually don't have to focus on that work which is less meaningful when I get there. And then when I get to our retreat or wherever you are starting this life planning process. The first thing I do is I start with a list of reflection questions and they reflect on the previous year they reflect on the core of who I am and really help to set out this.

41:19.12

lovelightstories

Foundation and groundwork for moving into the actual life planning process itself and those questions I came up with myself. They're ones that I found useful and hopeful for me and that is actually you mentioned earlier the yearly life planning reflection journal that I've put together. That journal includes all of those questions and I've decided to just create it to be able to share with everyone in my audience because it's been so helpful for me and um, it's something that I hope can be helpful for others as well. So I start there and then. I look I use to be honest, like I said you're going to hear about this book a lot before I'm done here but I use the living forward book every year I went through it the first year like I said when I was so sick and everything I went through it very in-d depth then I don't read the whole thing every year but I go back through it. Um, because he walks you through the very beginning of digging into your core some activities like we said the eulogy and lots of things like that. But then getting into the action plan and more tactical things and so I review that as a way to kind of ground myself in um, the importance. Of my purpose and everything and and then I start getting into what are the the core big goals or big areas of my life that I really want to focus on this year and how like what are the main tasks and or.

42:55.72

lovelightstories

Sub goals within those things that I'd like to hit on and then of course how can I like what support do I need do I need to get support from anyone or or what other resources that I need um and then and then it gets much more tactical right? I usually set aside some time. Um, for my business it it may be working on my project plan for a certain project or my editorial calendar for my podcast episodes um things like that where it gets a lot more tactical and then we then the last part of our retreat is. Together more together where we're so walking on the beach talking about our goals like we've already discussed um and sharing those and then we align on our shared. You know, household budget and vacation time and you can see how it kind of builds into this more very detailed. Plan but it's all building from this intentional Place. So That's how um we do it and let's see if there's anything else I I Missed. Um, no I That's kind of really the process that we go through and and we just use it a.

43:56.25

Kayla Clark

Yeah.

44:12.32

lovelightstories

Ah, template you know, ah a word document template that um I think Kayla you actually helped us put together. We still use that and then um, my husband uses other apps and stuff like he'll use trello to manage and keep track of things I use asana to keep track of my actual project plans. You know you can get. I have um, power sheets that I use. Um they're called power sheets. You can look them up but you know there's different ways to actually go about managing this but the process of identifying what's important to you um can be similar and. Actually Kayla I

think you have some really good ways to get into that core stuff too like activities and and suggestions too. So do you want to share some of those things that you've done with families and other.

45:00.67

Kayla Clark
The.

45:07.39

lovelightstories
Tips and tricks. Basically.

45:09.62

Kayla Clark

Sure I would love to. Um so going back to kind of that tactical piece that you're speaking about is kind of I think where we tend to use those smart goals the specific measurable achievable relevant time-based that can just be helpful. To help plan out. You know you being a former project manager and and probably having much more access to these types of tools and gantt charts and all of these things again use what helps you and I love that you spoke to the difference in how each of you you and your husband. Manage each of your own life plans I love the idea of an app I'm ah I'm a listmaker so I love to use Todoist I love taco by Trello I love all of those things. However, what I would want to caution is don't try to do it all use what matters to you use what works for you find. Find what works for you. The last thing we want is to create something that is so um, so big or or too much that it becomes overwhelming the life planning process is really meant to be empowering. And so if we're we're trying to do too many things all at once sometimes that can actually be demotivating. So if you have methods that you know work for you. Do that for some people that's just having you know a ah physical planning book.

46:38.26

Kayla Clark

Where it has maybe some of those guided reflection questions or maybe it's just a blank journal where you write it down and you continue to add to it and come back to it throughout the year I think that it's just it's so important to find what works best for you and to continue to reflect on how you can make this an iterative process. Continues to support your own growth and development. Um, but but when we're thinking about you know other activities or exercises things like that I think similar to the eulogy exercise. 1 thing that I've found to be really impactful for families.

46:59.53

lovelightstories
Yes.

47:15.71

Kayla Clark

Some of which I've worked with who come together to do some of their life planning where they're having a family retreat where they're getting away for a weekend or they're intentionally sitting down together and they share some of these different stories with each other and one of the things or one of the exercises that we've used that I've seen. Be, really impactful as what we call the eightieth birthday exercise and again all it is is a set of questions that just puts you in that space thinking to your eightieth birthday or you know if Mama Dad are a little bit older. You're ninetieth or your hundredth birthday who's there who are the loved ones that.

47:40.33

lovelightstories
Um.

47:54.73

Kayla Clark

Are looking at you and celebrating you What are they sharing and saying what are the what are the fun things or the stories and I have just seen that be so powerful and meaningful for families and and then they're able to explore together about why they wanted certain people there or. What it was really at the core of why accomplishing something or doing something in their life was so meaningful and important and that's where we see with families wanting to do more together where they can tie their life planning as you've done to your budgeting to finances or financial health. Also. Philanthropy planning that philanthropic initiative can be really difficult for families to start at times because we have different things that are meaningful for each of us. But if we can come together and say hey where are we at with each one of our life plans and. Again, going back to that core those core values. What's really most important at the end of the day and what are those different causes or groups of of people or initiatives that help us to fulfill that and again with with this process. It's not necessarily tied to money right? There are different gifts talents time that we can share to give to others and so I just I look at using life planning not just as you know setting goals and things you want to accomplish for yourself. But how do you want to change the world.

49:27.23

Kayla Clark

What would that mean? what would that matter as we look up I'm sorry, go ahead. So as we look at you know the development itself again. It's different for different people. 1 thing I love that your dad has done with his life plan.

49:29.13

lovelightstories

Yes, yes, Nope go ahead.

49:46.60

Kayla Clark

He has embedded hundreds of quotes and I think that's become its whole other spinoff project of the the Steve Johnston quote compilation of all of the most meaningful things that he found in life. But wow what just another legacy to leave behind. Um.

49:50.35

lovelightstories

Um.

50:01.40

lovelightstories

Yes.

50:04.74

Kayla Clark

But things like that where whether it's you know, song lyrics or quotes or poems maybe versus from the bible Again. It's it's incorporating those things that are going to continue to draw you

back to it in a way that's motivating and meaningful and not. Okay, it's the end of the month or okay, it's the end of the the quarter or the year I got to go back through my life plan again if that's how you're feeling about it. That's not what we want. That's not going to be impactful for you as nearly as much as it is when you're excited and energized. To go back to it and to say okay where am I at.

50:43.42

lovelightstories

Yes, and I love too. How you you brought up the philanthropy piece again in the family cohesion and all of that because um, it really, that's essentially how we started working with you like we said at the beginning and um, started the life planning process as a family. Um, and. Recently it just took on more of a role of helping to lead and coordinate our family philanthropy efforts and you're right? It is a big task and there's a lot of different voices in the room with different personalities and and different. Um, you know core purposes and causes that we care about and um. Being able to really get to our own core first and share that with the family and communicate that just like my husband and I do on our retreats. We have family retreats like you are describing where we do more of that work and we do it with you and Justin and um, it's. Again, that intentional practice that brings you together around what matters to you but then more importantly, what you share together as a family and how you can implement that in the work you do together for the world and in our case, um, in this instance, philanthropy. And so um, it really is just such a beautiful applicable process that um, really empowers yourself and everyone you love around you to work together and um.

52:13.41

lovelightstories

Build something greater out of your life. You know, leave that legacy behind.

52:16.16

Kayla Clark

Yeah I love that you're speaking to the family cohesion piece in this and and again we think about different exercises that we can use as we go along and incorporate this life planning tool in other areas or aspects of our life such as philanthropy. Um, there was 1 year where we had each of you present to your family hey here is this cause that I care about here's why here's why I believe it's important here's who it helps here's all the good things it does and the impact and how that ties not only to my personal development and my life plan. But to our family and our shared family values using processes or other models like the you know the 5 y's and again just continuing to ask why why Why? not to challenge someone or to you know, shut them down or to share. Maybe you know what? you don't like about. You know part of their life plan or or philanthropic effort that they care about but to really understand it. What does it mean? What does it matter? What does it improve and does that tie back to that core purpose.

53:26.93

lovelightstories

Yes, yes, and for those listening you might be like wow this is really an exciting thing like I didn't understand life planning in this way. Um, it's something that I'm interested in or maybe dipping my toes in. Um, but you're probably like we've talked about a lot today and a lot of different ways. You can go about this and it might still feel a little ambiguous as to how to get started and so um, 1 thing that I would love to do is I'd love to share like.

53:50.94

Kayla Clark

And.

53:58.94

lovelightstories

What I've put together as resources to help you do that and Kayla if you want to tag onto that. Please do because again this started with you as my advisor. Um I'm just coming from the table of having done this for so many years and finding what works and I I want to. Leave everyone listening with kind of a place to start so it doesn't feel so overwhelming. Um, and so um, that's part of why I created this yearly life planning reflection journal because again I said that the way I start is is really with that reflection piece. Um, and in that journal I also include my favorite life planning resources I talk about this living forward book of course. Um, but I also have 2 blog posts in there. Um, that really share more about the process that I use and the tips and tricks and things of that sort. So trying to kind of give you some places to start to go on your own to dig into this um and then I also have an option where you can actually work with me to um, refine answer questions share experience. Um, talk out your life plan any ah of the above. Um, in anyone who who who does grab this this life planning reflection journal. So.

55:24.73

lovelightstories

Trying to give you some resources to begin with to dig into and I Really do believe if you use this living forward book as one of your resources you're going to feel like you're so much more confident in what you're doing and it won't feel as ambiguous and like we said this is a fluid process. It's flexible and so you can use a lot of other. Resources as well to tag onto that. Um, but personally I recommend that as a really really great start. Um I'll include it in the show notes of course as well as the blog posts and a link to the reflection Journal Um, and then you know I want to try to walk with you if you would like to. To do this because I do think it's so powerful So I do have that option to um to walk with? Yeah yes.

56:05.23

Kayla Clark

Yes, take advantage of it meet with her talk to Stephanie she will help you I can't tell you how how impactful and important an accountability or sounding partner is in this process and I think. That few of all people are just so genuine and positive and supportive and I think that that can be really really helpful for people in actualizing their goals and even when they're not able to right being able to come back to someone and say hey I'm really struggling. What was your experience and I know and for all of her listeners out there. She will share with you her experience and and what those setbacks were and then also you know provide what she can to share how how she got through it or help you to be a sounding board and and to just help you work through.

56:44.63

lovelightstories

Yeah, yeah.

57:00.25

Kayla Clark

Maybe what your next steps are.

57:03.61

lovelightstories

Yes, Yes I think having the ability to have someone you can lean on as you're going through this process or just starting it. It gives you a lot of confidence um and support and it it makes your own process more fluid and flexible as well because you can really. Begin to dig into things. Um, that are unique to you.

57:21.51

Kayla Clark

Yes, and and speaking Stephanie to the tangibility of this right? And what is the life plan. How does it look. We've talked about you can make it whatever it is that speaks to you. 1 of the things though that I do want to point out that I think you have done very well in yours is you haven't just said here are all the goals I want to accomplish and here are the different sort of pillars or places of my life that they tie to you've actually been really great about breaking that down into more bite tries. Manageable chunks and saying okay, um, what are my you know? Yes, what are my annual goals. But what are my 5 year goals 10 year goals life goals you've actually gotten a little bit more granular so that it's not just at the end of the year okay what were all the things I did. It's. What is the things that I'm doing that are really helping me to get to where I ultimately want to go and so that's I think a critical component that I don't want your listeners to forget is yes long-term yes big picture and also day-to-day and again those goals can be process goals. So again, it's not necessarily that you're doing anything other than the things that are in support of your wellbeing and that life planning again that might be just going for walks taking care of your mental health taking care of your physical health being intentional about what you're eating or your diet.

58:51.29

Kayla Clark

Like that that maybe play into your overall bigger life planning goal of that might be perhaps losing weight or it could be really just feeling healthy. So I don't want to minimize that there are different types of goals here and others are process outside of process goals are those outcomes. Outcome goals I do want to do this thing I do want to read 10 books I do want to yeah and so balancing those I think is really important too.

59:11.40

lovelightstories

Yes, yes, I'm very happy you brought that long-term vision that.

59:21.80

lovelightstories

Yes, yes, definitely because having those longer term five year ten year like where am I headed and then how is my yearly or today goals going to tie into that. That's part of what really gives you that. Compass of what you're steering towards and that's how 10 years from now you look back and again it might look different than what you wrote on paper but it was intentional and you weren't drifting and you feel confident in that and there's so much power and value in that.

59:51.80

Kayla Clark

Any you know I think to to anyone who's curious about it or anyone who's ever said? Oh yeah I've I've you know I've written goals before and I didn't you know achieve them and it ended up making me feel worse again. Life planning is more than just goal setting. It's a lot more intentional. It's a lot deeper. It can be incredibly transformational and just take 1 step but it kind of reminds me of this song that I really like listening to it starts out to change the world start with 1 step however, small.

01:00:12.57

lovelightstories

Yes.

01:00:27.00

Kayla Clark

Right? Like that first step is hardest and what I love about that. It's just do what you can and and continue to build. It can be a building process. It can be a growth process and a journey and it doesn't just have to be you go it alone.

01:00:43.21

lovelightstories

yes yes I love that reminder I think that is a great place to end Kayla but before we we say goodbye I'd like to just ask. Um, if people want to connect with you that are interested in the work that you do with families. How can they find more about what you do and um premier performance advising.

01:01:04.26

Kayla Clark

Go to the website. That's it premierperformanceadvising.com we're based in Minneapolis Minnesota but we work with families all over the country and when they want to go outside of the country for their their journeys or their their retreat. So.

01:01:19.30

lovelightstories

Yes.

01:01:22.13

Kayla Clark

Sky's the limit. It's really what's comfortable for you. But if you're curious, give us a look on our website.

01:01:27.39

lovelightstories

Wonderful! Well Kayla this has been such a good conversation I can't wait for listeners to hear this and um I just thank you so much for being on the show I have envisioned doing something like this with with you for so long. Because there really is I feel like it's a hidden secret like like more people need to learn about this and know about this and um, you were 1 of one of the people really that were there at the beginning of my journey fourteen years ago so again it's just a complete honor to have you on the show.

01:01:59.80

Kayla Clark

The honor and the pleasure is mine Stephanie I I love that you're sharing this with others and thank you so much for having me.

01:01:59.99

lovelightstories

And I thank you so much.

