

PURPOSE CHECK-IN WORKSHEET

Your Real Estate Why

Reconnect with the reason you started this journey.

- What originally drew you to real estate?
- What part of the job makes you feel most alive or fulfilled?
- Who or what are you doing this for?

Write freely – there are no wrong answers.

Core Values Check

Are you building a business that aligns with who you are?

Circle or write down 3–5 values that matter most to you:

(Examples: Freedom, Integrity, Impact, Connection, Creativity, Balance, Growth, Leadership, Family, Service)

- Are these values reflected in your current business?
- If not, where do you feel out of alignment?

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Your Zone of Genius

The sweet spot between what you're good at and what energizes you.

- What real estate tasks or parts of the business do you genuinely enjoy?
- What do clients often praise you for?
- What drains your energy or feels out of alignment?

Client Connection

Who do you love serving – and why?

- Describe your ideal client.
- What do they need that you're uniquely able to provide?
- Are you currently attracting these kinds of clients?

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Burnout Radar

Tune in before the burnout hits.

Check in with yourself (scale of 1–10):

Mental energy

Physical energy

Emotional energy

Joy in your work

Where are you overextending?

What boundaries need to be reinforced?

Realignment Action Plan

Small shifts create big impact.

Pick 1–3 small changes you can make this week to get back into alignment:
