

## DEFINING THE WHOLE PERSON

*Becoming a Whole Person is not a one-time event. Whole Persons are engaged in a lifetime quest to achieve balance in all aspects of their lives. Achieving one's full potential, while engaging in a meaningful and rewarding journey, is a lifelong goal.*

**RELATIONSHIPS** Whole Persons spend meaningful time with their spouses, children, immediate family and friends. They strive to make sharing, love, mutual respect and openness the cornerstones of these relationships.

**HEALTH** Whole Persons maintain a sound mind and body through study, a well-balanced diet, regular exercise, and lifestyle choices conducive to physical and mental well-being.

**EDUCATION** Whole Persons seek to enrich their lives through continual intellectual development. They enthusiastically engage in meaningful pursuits that enrich their lives and the lives of others.

**CAREER** Whole Persons strive to become more productive, enhance their professional esteem, pursue increased knowledge, and contribute to industry and professional organizations. They also seek to improve the careers of fellow professionals through mentorship and leading by example.

**SERVICE** Whole Persons contribute "hands-on" time, including energy and leadership, and financial resources to community organizations, educational institutions, government, civic and charitable organizations, and other worthwhile endeavors, voluntarily and without expectation of personal gain.

**FINANCIAL** Whole Persons know how to live within their means, to enjoy and share the fruits of their labor, and to plan and implement programs for the creation, accumulation and preservation of capital consistent with the stages of their lives.

**SPIRITUAL** Whole Persons live their lives according to their faith and strive to grow spiritually while helping others toward greater fulfillment.

## FROM THE EXECUTIVE COMMITTEE

When philosopher Dr. Mortimer J. Adler introduced MDRT members to the Whole Person concept at the 1961 Annual Meeting, little did he know the full impact his words would have on the lives of so many people more than four decades later.

At MDRT, we are committed to this vitally important concept, and want all our members to understand the value and benefits of balancing their lives in seven critical areas: relationships, health, education, career, service, financial and spiritual. In fact, in light of today's tough economic climate, committing to be a Whole Person has perhaps never been more important.

Visit [www.mdrt.org](http://www.mdrt.org) to learn more about several exciting Whole Person initiatives that will help our members create success for their entire life. We hope you will engage in these activities and commit to being a Whole Person this year and for years to come.

## MDRT Executive Committee



**MDRT**

The Premier  
Association of Financial  
Professionals®

Million Dollar Round Table  
325 West Touhy Avenue  
Park Ridge, IL 60068 USA

Phone: +1 847.692.6378  
Fax: +1 847.518.8921  
Web site: [www.mdrt.org](http://www.mdrt.org)

# The Whole Person



Creating  
Success  
for Your  
Entire Life

## STAYING IN BALANCE DAY AFTER DAY

For some people, achieving a good work-life balance seems to come naturally. Yet, many of us constantly struggle to manage priorities in our professional and personal lives.

As a successful financial services professional, are you leading the fulfilling and enriching life that you want? Or, do you recognize there are areas you may be neglecting or could improve?

With all the demands for your time and attention, it is easy to lose touch with the other equally important aspects of your life—family, community service, health and spirituality. To bring all those elements into balance, many MDRT members have embraced the Whole Person concept.

Living a well-rounded, balanced lifestyle and becoming a Whole Person is the foundation for:

- Ongoing happiness
- Good health
- Loving family relationships
- Financial security
- Strong friendships
- Intellectual fulfillment
- Self-confidence

## THE BALANCE QUIZ

To highlight imbalances in your life that may require attention, review each statement and assess yourself on a scale of 1 (low) to 10 (high). Add your scores for each category and enter the total next to the category heading. Maximum score per category is 30.

### RELATIONSHIPS Total score \_\_\_\_

- \_\_\_\_ a. Spending time with my family and friends is structured in my daily and weekly schedule.
- \_\_\_\_ b. I give family and friends my full attention by turning off my phone/PDA/BlackBerry/laptop/iPod when I am with them.
- \_\_\_\_ c. I regularly talk with family members and ask how I can be a more loving spouse/parent/etc.

### HEALTH Total score \_\_\_\_

- \_\_\_\_ a. I invest at least 30 minutes in cardiovascular exercise three times per week.
- \_\_\_\_ b. Meals are well balanced and I exercise moderation in sweets and other snacks.
- \_\_\_\_ c. I choose a smoke-free life and control alcoholic consumption.

### EDUCATION Total score \_\_\_\_

- \_\_\_\_ a. Reading, studying and attending classes (traditional or virtual) is important to me.
- \_\_\_\_ b. I have a passion for learning.
- \_\_\_\_ c. Electronic entertainment (Internet, television, movies) is used in moderation.

### CAREER Total score \_\_\_\_

- \_\_\_\_ a. I invest time and other resources in the development of my intellectual resources.
- \_\_\_\_ b. Increasing productivity is a component of my personal and professional development plan.
- \_\_\_\_ c. I have created and regularly review my business and succession plan.

### SERVICE Total score \_\_\_\_

- \_\_\_\_ a. I am actively engaged in community or industry service activities.
- \_\_\_\_ b. Others in the community view me as a leader and can count on my help when needed.
- \_\_\_\_ c. I positively influence the lives of others through formal or informal mentorship.

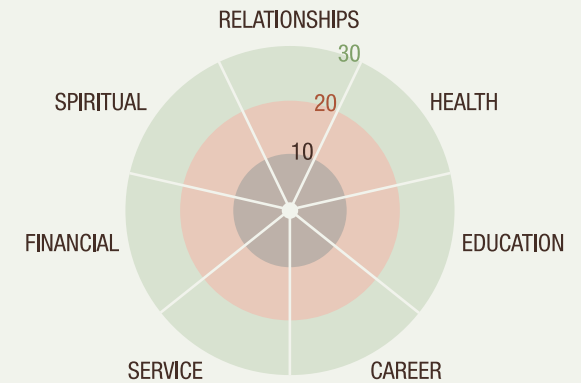
### FINANCIAL Total score \_\_\_\_

- \_\_\_\_ a. I have written financial goals.
- \_\_\_\_ b. I live within my income.
- \_\_\_\_ c. I am creating, accumulating and preserving capital consistent with my stage in life.

### SPIRITUAL Total score \_\_\_\_

- \_\_\_\_ a. I have strong personal spiritual beliefs.
- \_\_\_\_ b. I spend time each day reflecting or reading spiritually inspiring materials.
- \_\_\_\_ c. I am passionate about leading a life that reflects my strong personal values.

Now, transfer your scores to the rings on the diagram. Then, connect the marks from one category to another.



Review the resulting form, shape and location. If your scores are fairly consistent, they form an approximate circle and fall mainly in the outer green ring—congratulations, you are living a well balanced life!

If, however, your scores vary significantly, form several peaks and valleys, or fall consistently near the inner brown ring, don't be surprised; most people who take this quiz find some areas of their lives that are out of balance.

Look closely at your highest and lowest scores; they are a reflection of your current priorities. If the resulting imbalance revealed on the diagram concerns you, take steps today to create a better balance in your life. For example, you may want to consider joining a study group, volunteering, going back to school, developing a hobby, getting more exercise, etc.

Remember, we are all on a journey to reach our full human potential.

It's time to get involved in your whole life again. Where would you like to grow?

- Relationships
- Health
- Education
- Career
- Service
- Financial
- Spiritual