

The 6 Types of Wealth: A Legacy Exercise for Fulfillment

Based on the framework by Sahil Bloom | Adapted for YPO Retreats by Jack Craven

This is not about fixing your life. It is about seeing it clearly. This exercise helps you identify where your life is truly alive and where you are succeeding on paper but drifting in reality. As leaders, our legacy is not just what we build. It is how we live inside our days. This is honest self-inquiry, not performance.

How to Use This Exercise

For each type of wealth:

- Read the framing. Reflect honestly.
- Circle one state: Thriving, Maintaining, Drifting.
- Rate your satisfaction from 1 to 10.
- Choose 1-2 concrete actions and share insights with your forum to generate support, momentum, shared wisdom and accountability.
- Do not rush. Discomfort is a signal you are doing this right. At the end you will choose 1-2 types of wealth to focus on for the next 90 days.

The Six Types of Wealth:

1. **Financial Wealth:** Money, assets, freedom of choice
2. **Time Wealth:** Ownership of your calendar and how you spend your days
3. **Social Wealth:** Depth and quality of your relationships
4. **Physical Wealth:** Health, energy, and vitality
5. **Mental/Emotional Wealth:** Inner aliveness, growth, and peace
6. **Spiritual Wealth:** Depth of meaning, connection, and inner alignment

1. Financial Wealth: What is your relationship with money now that survival is no longer the issue?

Reflect:

- How has your understanding of wealth changed since you became financially successful?
- Where does money still create quiet anxiety, pressure, or control?
- How has wealth shaped your relationships and sense of self?
- What feels unresolved or unclear about money in this chapter of life?

Circle one: **Thriving** **Maintaining** **Drifting**

Rating _____ /10

Act:

- What is one financial decision or conversation you have been avoiding?
- What is one action you will take to bring clarity or alignment to your financial life?

2. Time Wealth: You can make more money. You cannot make more time.

Reflect:

- How much of your time goes to activities that genuinely energize you?
- How much goes to low-value or draining obligations?
- How well do your calendar and stated priorities actually match?
- What stays on your calendar to avoid discomfort, boredom, or harder conversations?
- How much time do you spend on personal growth or pursuits that matter to you?

Circle one: **Thriving** **Maintaining** **Drifting**

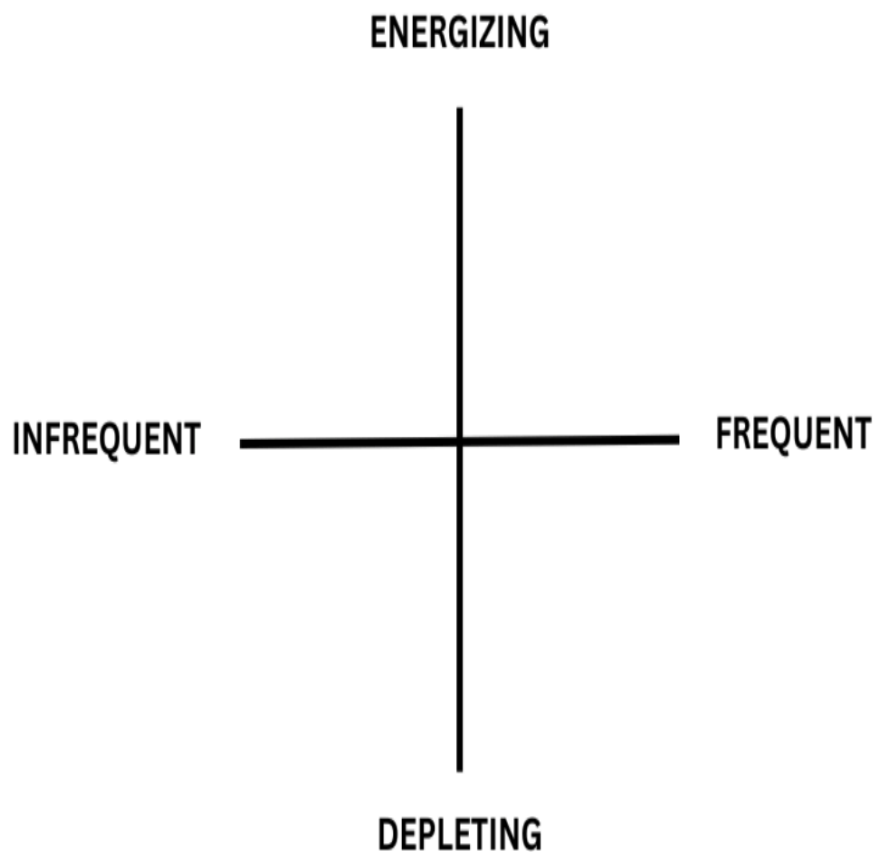
Rating _____ /10

Act:

- What would greater time freedom look like in practice?
- What will you cut, reduce, or delegate in the next 30 days?
- What is one specific schedule shift you will make this month?

3. Social Wealth: *Relationships are the key to our health and happiness. Your circle of friends shapes your growth, joy, and longevity.*

On the next page, write the names of friends and family and place them based on energy and frequency of connection. Include close relationships, surface-level and deep connections, fractured relationships, and activity-based relationships.



Reflect:

- Which relationships bring you the most joy? How would you like to prioritize spending time with them?
- Who would you call in a crisis?
- Who have you drifted from that still matters?
- Which relationships drain you, require clearer boundaries, and need attention?
- Who challenges you and supports your growth? Who do you call for fun and relaxation?

Circle one:

Thriving

Maintaining

Drifting

Rating _____ /10

Act:

- Which 1-3 relationships deserve attention now?
- What action will you take to deepen, repair, or reset it?

4. Physical Wealth: *Your body is the vehicle for everything else you care about.*

Reflect:

- How do you honestly feel about your current health and energy?
- Are you ignoring warning signs or postponing care or screening?
- How would you rate your diet, movement, rest, and recovery?
- What are you rationalizing that you know has a cost?

Circle one:

Thriving

Maintaining

Drifting

Rating _____ /10

Act:

- What is one behavior you will start or stop this week?
- Be specific about what, when, and how often?

5. Mental & Emotional Wealth: Inner steadiness, curiosity, and aliveness

Many leaders tie their identity almost entirely to their work. When work becomes the primary source of stimulation, purpose, and worth, life quietly narrows.

Reflect:

- How often do you feel inspired, curious, or mentally alive?
- What are you learning or exploring outside your role?
- What practices help you feel grounded, creative, or present?
- If your role disappeared tomorrow, what would still energize you?
- How much of your inner life is self-generated versus role-dependent?

Circle one

Thriving

Maintaining

Drifting

Rating _____ /10

Act:

- What is one non-work practice or pursuit you will commit to?
- How will you protect time for it?

Jack Craven

Living All In

6. Spiritual Wealth: Living with Meaning and Inner Alignment

Spiritual wealth is about alignment. It is the experience of being anchored to something larger than achievement, whether through faith, nature, values, purpose, or service.

Reflect:

- When do you feel most connected, peaceful, or fully yourself?
- What gives you a sense of awe or reverence?
- How aligned are your actions with your values?
- Where do you feel most at home inside yourself?
- What feels missing or thin in your inner life?

Circle one Thriving Maintaining Drifting

Rating _____ /10

Act:

Choose one:

- One practice to deepen connection
- One value to live more fully in the next 90 days
- One space, ritual, or community to nourish your inner life

Integration

- Look at your six ratings and states.
- Where are you thriving?
- Where are you maintaining?
- Where are you drifting?

If you could only focus on 1-2 types of wealth for the next 90 days, which one would most change the quality of your life:

- My 90-day focus is:
- One action I commit to starting immediately:
- Additional comments:

Forum Sharing and Reflection (5 minutes per participant)

Each person shares:

- Their six scores and states (thriving, maintaining, drifting)
- Where they feel strong and why
- Where they are drifting and what they want to shift
- The one action they are committing to in the next 90 days

Forum feedback guidelines

- Reflect what you see and sense
- Name patterns, alignment, or gaps
- Do not fix or advise unless asked

Group Discussion: The Hidden Cost of Imbalance

- What patterns are emerging across the forum?
- What trade-offs have we made by over-focusing on one form of wealth?
- What are the invisible costs to relationships, health, presence, or joy?
- What kind of leader does imbalance slowly turn us into?