

# WELLNESS ACTION CHECKLIST:

## SMALL STEPS TOWARDS BETTER BALANCE

**How to use this:** Choose 2-3 areas to focus on this week. Check off actions as you try them: progress, not perfection.

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### PHYSICAL WELLNESS:

#### *Support Your Energy*

- Take a 10-15 minute walk or stretch break during the day
- Add one balanced, nourishing meal or snack to your routine
- Set a consistent wind-down time before bed
- Schedule or plan your next preventive health check

### EMOTIONAL WELLNESS:

#### *Manage Stress & Recharge*

- Take 5 minutes for deep breathing or quiet reflection
- Write down one thing that's been on your mind
- Replace one negative thought with a more constructive one
- Build in a short "reset" break during your day

### INTELLECTUAL WELLNESS:

#### *Stay Curious*

- Read or listen to something new (podcast, article, book)
- Try a new activity or revisit a hobby
- Have a meaningful conversation about a topic of interest

### SOCIAL WELLNESS:

#### *Strengthen Connections*

- Reach out to a friend or family member
- Schedule time for a social activity (coffee, walk, call)
- Explore a group, event, or community activity

### ENVIRONMENTAL WELLNESS:

#### *Improve Your Space*

- Declutter one small area of your home or workspace
- Spend at least 10 minutes outside
- Adjust your environment to feel more calm or organized

### SPIRITUAL WELLNESS:

#### *Create Time for Reflection*

- Take a few moments to reflect on what matters most to you
- Practice gratitude (write down 1-3 things)
- Spend time in a calming or meaningful activity

### OCCUPATIONAL WELLNESS:

#### *Align Time & Purpose*

- Identify one priority for the day and focus on it
- Take a true break during your workday
- Acknowledge one accomplishment, big or small

### FINANCIAL WELLNESS:

#### *Build Confidence Over Time*

- Review a recent expense or account
- Set or revisit one short-term financial goal
- Take one small step toward organization (e.g., list accounts, set reminders)
- Schedule time to review your finances this month

The guide emphasizes that everyday habits like how we spend, save, and plan, can influence multiple areas of life, including stress, routines, and overall balance.

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### IMPORTANT DISCLOSURES

Content in this material is for educational and general information only and not intended to provide specific advice or recommendations for any individual. Material prepared by LPL Marketing Solutions.

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