

# GOAL SETTING SHEET

## long-term goals (10 years)

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Start date: \_\_\_\_\_

End date: \_\_\_\_\_

## short-term goals (5 years)

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Start date: \_\_\_\_\_

End date: \_\_\_\_\_

## immediate goals (within the next 12 months)

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Start date: \_\_\_\_\_

End date: \_\_\_\_\_

What obstacles or distractions can get in the way of achieving my goals?

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How can I overcome these obstacles? \_\_\_\_\_

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## financial goals

*How is your debt? In what areas should you conserve cash and in which can you spend? What are your retirement goals and what is your plan and vehicle on getting there? Planning and talking about your financial goals now will make a huge difference later and can help ensure you'll have enough income to live comfortably after you stop working.*

- My total debt is \_\_\_\_\_. I will reduce my debt to \_\_\_\_\_ by the end of this year.
- My yearly spending on credit cards is \_\_\_\_\_. I will reduce my spending to \_\_\_\_\_.
- My monthly contributions to my emergency fund is \_\_\_\_\_. I will increase/change that to \_\_\_\_\_.
- My monthly contributions to my savings/retirement plan is \_\_\_\_\_. I will increase/change that to \_\_\_\_\_.
- I can save more money by cutting my spending down on \_\_\_\_\_.
- My retirement goal is to have \$\_\_\_\_\_ by age \_\_\_\_\_.

## business goals

**1** I want to earn \$\_\_\_\_\_ each month. My income goal for the year \_\_\_\_\_ is \$\_\_\_\_\_.

**2** I am prepared to give the following to achieve my income goal:

- \_\_\_\_\_ Number of hours per week
- \_\_\_\_\_ Number of appointments set per week
- \_\_\_\_\_ Number of referrals received per week
- \_\_\_\_\_ Number of presentations per week

**“Without goals and plans to reach them you are like a ship that has set sail with no destination”**

## mission statement

I, \_\_\_\_\_, have taken the time to analyze my current situation and set up realistic but challenging goals, that I will accomplish by the dates I have set forth. To achieve these goals I know I need to eliminate my distractions, commit the necessary time and focus on profitable activities. I will post this worksheet on my wall and look at it on a daily basis. I will spend at least 10 minutes every morning planning my day to achieve these goals.

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