

## My Goals

This will take some time to complete. That is fine. Do a little bit at a time. It actually is best to do it that way to give yourself some reflection time. This probably requires thinking more deeply about your money matters than you have done before. It is very likely though to be worth the effort. Also, don't do it and forget it. Revisit it often. Goals change. Plans change. Conditions change.

**Before getting to specific goals and without concern for money, if your life could be anything you wanted it to be, what would it be right now?**

Where would you live?

Why don't you already live there?

What would your house be like?

Why don't you already have it?

Who would your friends be?

Why don't you already have them?

How would you spend your time?

Why don't you already do that?

What would you eat/drink?

Why don't you already do that?

What would you wear?

Why don't you already do this?

Where would you work?

Why don't you already do that?

What do you want to learn?

Why don't you already do that?

Where would you like to vacation? What would you do?

Why don't you already do that?

What else would be part of a perfect life?

What things in life would you enjoy most?

**Before getting to goals, what are things to get rid of? These are things that exist in your life right now that you'd be better off without. Habits, clutter, distressing people, unpleasant environment factors, unnecessary expenses, fixations, collections, annoying verbal habits..... Anything at all that you'd be better off without. It is usually best to have a few (like 3) primary things you want to change. However you can add as many as you wish.**

**First**, I want to eliminate: \_\_\_\_\_

in 30 days \_\_\_\_ 3 months \_\_\_\_ 6 months \_\_\_\_ one year \_\_\_\_ two years \_\_\_\_ no idea \_\_\_\_ .

When that is done my life will be better because (fill in)

**Second**, I want to eliminate: \_\_\_\_\_

in 30 days \_\_\_\_ 3 months \_\_\_\_ 6 months \_\_\_\_ one year \_\_\_\_ two years \_\_\_\_ no idea \_\_\_\_ .

When that is done my life will be better because (fill in)

**Third**, I want to eliminate: \_\_\_\_\_

in 30 days \_\_\_\_ 3 months \_\_\_\_ 6 months \_\_\_\_ one year \_\_\_\_ two years \_\_\_\_ no idea \_\_\_\_ .

When that is done my life will be better because (fill in)

**Before getting to goals, how would you rate your money situation? Circle one for each question.**

How would you rate your current financial situation?	Terrible	Could be Worse	OK	Pretty Good	Wonderful
How would you rate how fully you understand your financial situation?	Terrible	Could be Worse	OK	Pretty Good	Wonderful
How would you rate your control of your financial situation?	Terrible	Could be Worse	OK	Pretty Good	Wonderful
To what level do you live in fear due to money?	All the time	A lot	I'm OK	Sometimes	Never
To what degree do you have stress due to money?	All the time	A lot	I'm OK	Sometimes	Never
I have enough money to do what I need to do.	No	Usually	Yes		
I have enough money to do what I want to do.	No	Usually	Yes		
Does your financial situation negatively affect your hope for the future?	No	Sometimes		Often	
Does your financial situation negatively affect your work?	No	Sometimes		Often	
Does your financial situation negatively affect your family?	No	Sometimes		Often	

**Now for financial goals I want to achieve. Enough room as been left for 3 goals. That's because it is best to have a few number of really important goals that you really want to accomplish. If you want to add more that's fine of course.**

**First Financial Goal:** \_\_\_\_\_

What I am willing to do to achieve the goal?

What will happen if the goal it not achieved?

How will I know if the goal is achieved?

What financial resources are needed?

What skills are needed?

What are your strengths to achieve this goal?

What are your weaknesses to achieve this goal?

What opportunities exist to support achieving this goal?

What are the threats to achieving this goal?

What can I do to make this easier, faster, cheaper, and with less risk?

**Second Financial Goal:** \_\_\_\_\_

What I am willing to do to achieve the goal?

What will happen if the goal it not achieved?

How will I know if the goal is achieved?

What financial resources are needed?

What skills are needed?

What are your strengths to achieve this goal?

What are your weaknesses to achieve this goal?

What opportunities exist to support achieving this goal?

What are the threats to achieving this goal?

What can I do to make this easier, faster, cheaper, and with less risk?

**Third Financial Goal:** \_\_\_\_\_

What I am willing to do to achieve the goal?

What will happen if the goal is not achieved?

How will I know if the goal is achieved?

What financial resources are needed?

What skills are needed?

What are your strengths to achieve this goal?

What are your weaknesses to achieve this goal?

What opportunities exist to support achieving this goal?

What are the threats to achieving this goal?

What can I do to make this easier, faster, cheaper, and with less risk?

**Now keep this document handy and revisit it every few weeks.**