

Personal Goal Sheet

Achieving your goals and dreams

Step 1 On your personal goal sheet write down your goals and dreams. Brainstorm and don't let logic get in the way. Let your imagination run wild. But ensure your goals have specific detail that will make the goals measurable and you will know exactly when you have achieved it. For example, instead of saying 'I want to see the world', make it more specific and describe which countries and cities you want to visit. Write down your goals in all the main categories of life, including Finance/Wealth, Family/Friends, Health and Lifestyle/Travel. In trying to determine your goals, dream and visualise your ideal life. What possessions do you have in your ideal life? What would you do with your time if you had all the time and money in the world? How would your relationships look and feel with the people you care most about? What would you change about your life right now?

Step 2 Add timeframes to each of the goals. This is your chance to review the big dreams you have and make them real by adding timeframes.

Lifestyle and Travel

Due Date

How often do you want to travel? Is there somewhere you have always dreamed of going? What possessions do you want (eg. boat, premium car, helicopter)? In an ideal world how many days per week would you work?

My Goals and Dreams

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01



Family and Friends

Due Date

How much time would you like to spend with family and friends? How do you want your relationships to look and feel? What do you want to be able to give your children eg. private schooling, help them financially when they need it, leave a legacy.

My Goals and Dreams

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01



Finance and Wealth

Due Date

Do you dream of a new home? How would you like to feel about money and your finances? When would you like to retire and how much passive income (i.e. income you receive without having to work for it) would you like during your retirement?

My Goals and Dreams

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Personal Goal Sheet

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01



Health

Due Date

What would you change about your life to improve your health if you had more time and money?

My Goals and Dreams

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Goal Summary Sheet

Achieving your goals and dreams

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Step 3 Select and highlight the 2 goals in each category that are most important to you in the short term (i.e. <12 months), the 2 goals in each category that are most important to you in the medium term (1-5 years) and the 2 goals that are most important to you in the long term (>5 years). The goals that you choose in this step should be those goals that excite you and you are most passionate about. They may also scare you at this point but that is ok, too.

Step 4 Rewrite the goals highlighted in step 3 on your Goal Summary Sheet below and stick it up at home or in your office where you know you will see it every day without fail. You want to revisit these goals often to remind yourself of why you are doing what you are doing and help you to keep on track. Write about how you will feel once you have achieved these goals.

| | Health | Family and Friends | Finance and Wealth | Lifestyle and Travel |
|-------------|--------|-----------------------|-----------------------|-------------------------|
| < 12 months | | | | |
| 1 – 5 years | | | | |
| > 5 years | | | | |

Summary Goal Sheet

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01

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Q What does your existing lifestyle and financial situation look like and how do you feel about it?

Q What does your dream lifestyle and financial situation look like? How would that make you feel?



Action List

Achieving your goals and dreams

01



Step 5 Write down two actions that you can take right now in each category – this will form your immediate action list. Stick this Action List next to your Goal Summary Sheet and remind yourself of these actions daily. It is a great idea to review your action list regularly to ensure that you are always working on at least 2 tangible actions in each category of your life so you are always moving closer to where you want to be.

| | Action 1 | Due | Action 2 | Due |
|----------------------|----------|-----|----------|-----|
| Health | | | | |
| Family and Friends | | | | |
| Finance and Wealth | | | | |
| Lifestyle and Travel | | | | |



Your Dream Board

Achieving your goals and dreams



Step 6

Prepare a dream board that you look at every day. A dream board is basically an A3 sheet of cardboard or paper that helps you to visualise your dreams. I have included an example dream board above. From the internet and/or magazines, cut out pictures that represent the things you want in your life. It may help you to review the goals you set in step 4 in choosing the right pictures to represent what you want every aspect of your life to look like. For example, you may include a picture of your dream house or dream kitchen. You may include pictures of holidays you would like to take with the family. You may include pictures that represent the health vitality, relationships and happiness you want. Stick this dream board on a wall somewhere you will see it daily to help you stay focused and motivated.