

Goal Setting Worksheet

8 Areas of Life:	Top 5 Financial Goals	Make Specific, Measurable, Attainable, Action-Oriented	48 Hour Plan - what action will you take in the next 48 hours?	Who will you be able to enlist to help?	What's the timeframe to completion?
Sample: Finance	Save 10% from every pay cheque	Set up a separate bank or investment account with higher interest for automatic deposit every 2 weeks	Open up a separate savings or investment account	Financial Advisor to review options	Start contribution in two weeks. Date:
Finance					
Career					
Family					
Friends					
Spiritual/ Self Care					
Personal Development					
Health & Fitness					
Fun & Recreation					

*Adapted from the Purpose-Focused Financial Plan worksheet in The Finish Rich Workbook by David Bach, 2005