

GO FOR THE GOAL

Any investment in yourself is an investment towards a stronger future.

Plan the life you want to live by using this worksheet to identify long- and short-term goals. You'll find questions to help define your purpose, checklists to keep you on-task, and space to track progress and expenses.

FIND YOUR MOTIVATION

Consider one of these goals to get started!



Return to the workforce



Eat healthier



Save more towards retirement



Do more volunteer work



Stick to a fitness routine



Pursue a new hobby/interest



Spend more time with family



Improve quality of life



Get promoted



Create a monthly budget



Save for a future goal (vacation, second home)



Start a Financial Plan (eliminate bad debt, create a will)

MY GOAL IS:

WHY IS THIS GOAL IMPORTANT NOW?

WHAT OBSTACLES ARE STANDING IN MY WAY?

HOW CAN I OVERCOME THESE OBSTACLES?
