

Value Based Goal Planning Worksheet

Review each question and write down your answers. Narrative form is great but use bullet points if you just want to get ideas down quickly. Go with your first thoughts and gut feelings for the best insight. If you get stuck, find a partner to help you work through it or post your questions on our website at the address below. The important part is to
WRITE YOUR ANSWERS DOWN.

1. **Your Vision:** What is the feeling or state of being that you want to experience this coming year? Find the one word that best describes this. Think of this as your theme for the year. Fill in the blank: This is your Year of_____.
2. **Your Mission:** What do you value most in life? Why is this vision so important to you? What is the impact this will make? Does it fit with what you said you value?
3. **Your Goals:** What are the top goals, wants, wishes and dreams you have for this coming year? Do these fit with what you said in your vision and mission? How do they connect? If they don't, why are they on the list? What goals do you need to support the vision and mission you created? Are there "priority" goals that need to happen before other goals can occur or need to happen to make other goals easier to achieve?
4. **Your Framework:** Ask yourself...How do I feel about where I am now? How about compared to a year ago? What has worked well? What hasn't worked well? What do I know now that I didn't know a year ago? Am I being realistic with my goals? Am I expecting too much or too little to happen? How should I prioritize these goals? What might get in the way of my goals? How will I handle roadblocks or setbacks? What do I need to be successful? How will I monitor progress? How will I celebrate milestones?
5. **Your Objectives:** What are realistic targets/milestone of your goals that can be measured? Put these on your calendar.
6. **Your Action Steps:** What specifically needs to happen to reach the above objectives and in what order? Put these on your calendar.

Feel free to share your questions or insight at

www.speakofmoney.com