

Goals Assessment

Check all that apply to you and your goals. Even if none of these are applicable, they may provide inspiration and insight into goals that are applicable to you.

Home

- Move/relocate
- Buy a house
- Home improvements/addition
- Decorate
- Other: _____

Finances

- Remove credit card debt
- Save \$_____ money
- Have money for closing costs
- Set up retirement funds
- Evaluate existing retirement funds
- Other: _____

Career

- New job
- Raise and/or promotion at work
- Improve skills/credentials
- Pursue new career field
- Other: _____

Health/Fitness

- Lose weight, _____ pounds
- Work out _____ times per week
- Get health physical
- Lower cholesterol/blood pressure
- Run a mile/5k/marathon
- Other: _____

Relationships

- Reach out to long-lost friends
- Make time for friends/family
- Send personal notes to friends/family
- Other: _____

Spiritual/Well-Being

- Go to church regularly
- Meditate
- Read the bible, religious books and/or self-help books
- Pursue hobbies
- Other: _____

What is the ONE THING that you would like to FOCUS on now?

State your GOAL for this month.

If it is a long-term goal, then BREAK IT DOWN into steps and mini-goals.

Write down the FIRST mini-goal—this is what you will focus on now.

WHAT do you want to achieve?

WHY do you want to achieve it?

WHEN do you plan to achieve it by?

WHO can help you achieve this goal?

WHERE will this goal take place?

HOW will you accomplish this goal?