

# 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.**

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**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?