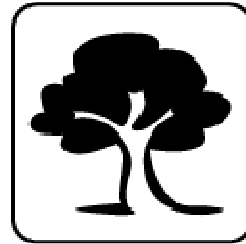
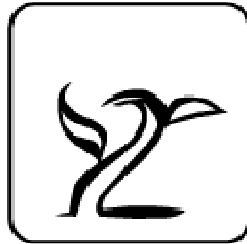
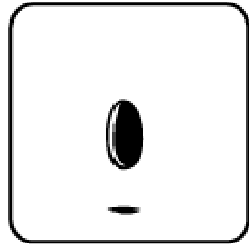


**STAGE OF LIFE™**



**REWARDS FOR LIFE'S JOURNEY**

# Goal Setting Worksheet

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## Stage of Life Goal Setting

Setting goals is a healthy, positive habit no matter what stage of life you may be experiencing. This worksheet kit is a great place to start thinking proactively about your life and the things you'd like to accomplish in the next year, but should really be used as a simple starting point from which to launch a larger conversation with both yourself and your loved ones about how to live a more fulfilling life.

*"In the absence of clearly-defined goals, we become strangely loyal to performing daily trivia until ultimately we become enslaved by it." –Robert Heinlein (1907-1988)*

*"The reason most people never reach their goals is that they don't define them, or ever seriously consider them as believable or achievable. Winners can tell you where they are going, what they plan to do along the way, and who will be sharing the adventure with them." -- Denis Watley*

## Instructions

This 10 Step Goal Guide is simple. We recommend that you follow these steps as you complete the Goal Worksheet...

1. Find a place to complete the goal activity where interruptions will be minimal
2. You may complete this by yourself or in tandem with a friend, family member, spouse, child or other loved one. We recommend that if you do the latter, you each complete the worksheets individually and then share afterwards.
3. Read and complete each of the 10 sections below. We encourage you to expand upon the goal categories listed below – what we've provided is by no means an all-inclusive list to approaching your own goals. This is a simple tool, and remember that you are the guide to your own life. Take control and enjoy it!
4. When you are finished, use the Summary Worksheet to copy your key goals from each section and then hang/post on your refrigerator, office door, bathroom mirror or other prominent place where you'll see them everyday.

*Let's begin!*

## Step 1: Health & Wellness Goals

*Quote. Eat better? Decrease stress? Lose weight? Increase strength? Start an exercise routine? Join a gym? Only you know what needs to be done for YOU when it comes to protecting your health & wellness. Stop talking about it and put it down in writing. Here are some areas to get you started – but expand upon them with other goals...*

- Weight Goal:
- Fitness Goals:
- Decrease food/drink consumption of the following: example - Soda
- Increase food/drink consumption of the following: example – Fresh Vegetables
- Eliminate unhealthy habits: example – smoking
- More:

## Step 2: New Frontier Goals

*This section is simple – what are things you've never done or tried before but have always wanted to? Parachuting? Climb a rock wall? Ride a horse? Record an album? The world is your oyster, what will you accomplish this year?*

- *This year, I will try:*
- *This year, I will try:*

## Step 3: Financial Goals

*How is your debt? In what areas should you conserve cash and in which can you spend? Will you be making new investments or selling old ones? Planning and talking about your financial goals will help decrease stress too. Here are a few questions to get you started, but add more from your own situation...*

- My total debt is \_\_\_\_\_. I will reduce to \_\_\_\_\_.
- My yearly spending on credit cards is \_\_\_\_\_. I will reduce to \_\_\_\_\_.
- My monthly investment contributions are \_\_\_\_\_. I will increase/change that to \_\_\_\_\_.
- I will expand my investments to include these new ventures:
- I can save money by:
- More:

## Step 4: Education Goals

*This could be anything ranging from learning to play a new instrument to reading a book once a month to going to the library to check out a biography or reference book on a topic you've always wanted to know more about to taking an online course or a painting class at your local community center to applying for your Ph.D. We should all be constant learners.*

- I will read the following books this year:
- I will visit the local library \_\_\_\_\_ times a month
- I will learn how to or about \_\_\_\_\_(topic/instrument/skill)
- I will take a community class on:
- I will take a training class through work about:
- College classes or advanced degree?:

## Step 5: Large Purchase/Home Improvement Goals

*Are you aspiring to buy or finance something that requires a bit more thought and planning? From remodeling a part of your home to buying an HDTV to leasing a new car to getting a puppy, whatever it is – approach key purchases with a sense of purpose so that care can be given to the decision.*

### Key Purchase

- Purchase #1:
- Purchase #2:
- More?

*For this section, it not even be an expensive remodel you're considering. Maybe you've been thinking about cleaning out the garage or the basement and having a yard sale. Maybe you want to plant a garden. No matter if it's big or small, the home improvement category is here to get you thinking about how to set goals for improving where you live, be it a house or condo or apartment.*

### Home Improvement

- Home Improvement #1:
- Home Improvement #2:
- More?

## Step 6: Travel Goals

*We don't care if it's a trip to the next town to go camping or that once-in-a-life-time journey to the Great Wall of China, experiencing the sites, sounds and tastes of new environments and the people that live there gives a larger perspective on life. Plus, memories are more vividly created when the normal routine is broken and you are taken out of your every day setting. Travel, whether it's local or international, should be a key part of your yearly planning. Remember – you don't need to spend a lot of money on these trip...be creative with the budget planning – it's about the adventure of travel).*

- Saturday Day Trip (location is within 2 hour drive and you return home the same day):
- Saturday Day Trip #2:
- Total Weekend Getaway (overnight stay):
- Family Vacation:
- Trip-of -Lifetime/International:
- More?

## Step 7: Family & Friends Goals

*Have you and your friends been talking about something for years but you've never taken the initiative to do it? Maybe it's a trip? Maybe it's starting a dinner club that rotates amongst friends' homes once a month? On the family front, do you have children and want to help them plan goals or interact with your family in a healthier way? For instance – maybe you want to set up a "Family Game Night" in which you all sit down at the table to play a game – no TV – no distractions – just family fun. Whatever the situation, this section is meant to help you proactively engage the loved ones around you – keeping in mind, of course, that the accomplishment of the goals set here can only be achieved by the participation of another.*

### Friends

- Friend Goal #1
- Friend Goal #2

### Family

- Family Goal #1
- Family Goal #2
- Family Goal #3

## Step 8: Community & Philanthropic Goals

*How can you help your community? Your church? A local or national charity? Can you volunteer time? Become a mentor? The basic question here is...how can YOU give back? Time, resources or money – it's up to you – but giving something back to your community or the world at large will create a positive sphere of influence around you, as well as give you life experiences and stories to share with others. Here are some questions to get you started.*

- I will donate money to the following organizations this year:
- I will donate time/resources to the following organizations this year:
- I will volunteer here this year:
- More?

## Step 9: Personal Goals

*There are some goals that don't fit nicely into any of the previous eight categories. These are, as the title reads, "Personal Goals." It might be something as simple as getting up 30 minutes earlier each day to read the newspaper or bowling a 200 game or as complex as launching a new business. Whatever they may be, your personal goals will very directly add to, improve or expand upon the quality of your life or what you want to accomplish.*

- Personal Goal #1:
- Personal Goal #2:
- Personal Goal #3:
- More:

## Step 10: Long Term Goals

*We know there are goals on your radar that, for whatever reason, cannot be accomplished this year. Or maybe even the year after. But these dreams, wishes, plans...goals...are probably ever present in your thoughts. Right? Well, this section is for you to write down these longer-term aspirations. At some point, you'll see them through...*

- Long Term Goal #1:
- Long Term Goal #2:
- Long Term Goal #3:
- More?

# Goal Summary

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## 1: Health & Wellness

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## 6. Travel

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## 2: New Frontier

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## 7. Friends & Family

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## 3: Financial Goals

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## 8. Community & Philanthropic

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## 4. Educational Goals

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## 9: Personal

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## 5. Purchase/Home

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## 10. Long Terms

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