

## GOAL SETTING WORKSHEET

**T**he challenge for many *DIY financial planners* is to convert wishful thinking into results. This worksheet is a supplement to *In Our Reach: How Resourceful Employees Build and Preserve Wealth at Work* and it offers a basic starting point.

GOAL SETTING WORKSHEET	
<b>What's the goal?</b>	
<b>What type of goal is it?</b> (see pgs. 147-148)	<input type="checkbox"/> Continuation <input type="checkbox"/> Transformative
<b>Is there an <i>In Our Reach</i> activity associated with the goal?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> Not Sure <input type="checkbox"/> No If "yes," what page of <i>In Our Reach</i> is it found on? _____
<b>Who will benefit if the goal is achieved?</b>	<div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> You  <input type="checkbox"/> Your Spouse  <input type="checkbox"/> Your Child(ren)  <input type="checkbox"/> Your Grandchild(ren)  <input type="checkbox"/> Your Parents               </div> <div> <input type="checkbox"/> Your Employer  <input type="checkbox"/> Your Community  <input type="checkbox"/> Your Cause  <input type="checkbox"/> Others: _____               </div> </div>
<b>When does the goal need to be achieved?</b>	<input type="checkbox"/> Immediate (Within 90 days) <input type="checkbox"/> Short-Term (90 days to 2 years) <input type="checkbox"/> Mid-Term (2 years to 10 years) <input type="checkbox"/> Long-Term (10 years or longer)
<b>Where will resources be found?</b>	<input type="checkbox"/> Personal Vendors: _____ <input type="checkbox"/> Government or Non-Profits: _____ <input type="checkbox"/> Employers: _____ <input type="checkbox"/> Workplace Vendors: _____
<b>Who will help complete tasks?</b>	<div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Spouse or Partner  <input type="checkbox"/> Parent(s)  <input type="checkbox"/> Child(ren)               </div> <div> <input type="checkbox"/> Financial Partner(s)  <input type="checkbox"/> Advisor(s)  <input type="checkbox"/> Mentor(s)               </div> </div>

**GOAL SETTING WORKSHEET (CONT.)****What steps are involved?**

Step # \_\_: \_\_\_\_\_

Step # \_\_: \_\_\_\_\_

Step # \_\_: \_\_\_\_\_

Step # \_\_: \_\_\_\_\_

Step # \_\_: \_\_\_\_\_

Step # \_\_: \_\_\_\_\_

**Plan Timeline:** Insert and label "Xs" on the plan timeline to signify steps identified above.

Start Date : \_\_\_\_\_

\_\_\_\_\_ : End Date

