

SMART GOAL-SETTING-REAL ESTATE INVESTING

Use this form to design clear, actionable goals for building wealth through real estate. Complete one row for each Category and Horizon, making sure every goal is: • Specific • Measurable • Achievable • Relevant • Time-Bound (SMART).

Category	Horizon	Specific Goal Statement	Metric & Baseline	Target Value	Key Action Steps	Why Relevant	Deadline
Cash Flow	Short-Term (≤ 12 months)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY
Cash Flow	Long-Term (3 – 5 years)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY
Equity	Short-Term (≤ 12 months)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY
Equity	Long-Term (3 – 5 years)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY
Lifestyle	Short-Term (≤ 12 months)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY
Lifestyle	Long-Term (3 – 5 years)		Current:	Goal:	1) _____ 2) _____		MM/DD/YYYY

Quarterly Progress Review

Schedule regular checkpoints to stay accountable. Record milestones and adjust action steps as needed.

Review Date	Wins & Milestones	Challenges	Next Adjustments
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____