

Personal Year-End Review Template

Use this template annually to reflect, learn, and intentionally plan for the year ahead.

1. Setting the Context

Year being reviewed: _____

Date of review: _____

Time spent reflecting: _____

Before you begin, take a moment to settle in. - Where are you completing this review?

- What intention do you want to bring to this reflection?

My intention for this review:

2. Looking Back: The Year in Review

A. Key Events and Milestones

List the most significant events, transitions, or milestones from this year (personal and professional).

B. What Did Not Happen (But I Hoped Would)

Reflect on goals, plans, or intentions that were not realized.

What factors contributed to this?

3. Wins and Successes

My Top 5 Wins This Year

For each win, note *why* it mattered and *what enabled it*.

1. **Win:** _____
Why it mattered: _____
What contributed to it: _____
2. **Win:** _____
Why it mattered: _____
What contributed to it: _____
3. **Win:** _____
Why it mattered: _____
What contributed to it: _____
4. **Win:** _____
Why it mattered: _____
What contributed to it: _____
5. **Win:** _____
Why it mattered: _____
What contributed to it: _____

4. Lessons Learned

My Top 5 Lessons This Year

Which lesson was the hardest to learn, and why?

5. Challenges, Setbacks, and Growth Edges

Significant Challenges I Faced

What did these challenges reveal about me?

If faced again, what would I do differently?

6. Patterns and Themes

Looking across the year, identify recurring patterns.

Patterns I Want to Continue

Patterns I Want to Change or Interrupt

What do these patterns tell me about my habits, priorities, or beliefs?

7. Roles and Identity Reflection

List your key roles this year (e.g., leader, parent, partner, friend, learner).

Role: _____

- How did I show up in this role? _____
- What am I proud of? _____
- Where do I want to grow? _____

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8. Mindset and Self-Leadership

Reflect on your internal experience this year.

- When did I feel most confident or energized?

- When did fear, doubt, or fatigue limit me?

- What beliefs served me well?

- What beliefs held me back?

9. Gratitude and Acknowledgment

What I Am Most Grateful For This Year

People Who Supported Me

10. Looking Ahead: Intentions for the Coming Year

My Word, Theme, or Focus for Next Year

Vision for the Year Ahead

Describe how you want to *live, lead, and feel* in the coming year.

11. Goals for the Coming Year

A. Outcome Goals (What I Want to Achieve)

B. Process Goals (Habits & Behaviors)

C. Identity or Growth Goals (Who I Want to Become)

12. Action Planning

For my top 1–3 priorities next year:

Priority #1: _____

First 3 actions:

- _____
- _____
- _____

Support or accountability needed:

13. Closing Reflection

What do I want to remember from this year as I move forward?

What commitment am I making to myself for the year ahead?

Reminder: Reflection turns experience into wisdom. Revisit this review quarterly to stay aligned with what matters most.