

### 8 MONTH 3: MEASURE & ASSESS

Snapshot (date: \_\_\_/\_\_\_/\_\_\_):

### 9 CELEBRATE!

Regardless of your finish, congrats on the effort!

Hindsight what went well and what less so. Then start anew!

Hindsight:

### 2 PICK YOUR LANE

What do you want to work on?

Health examples

- Vitals: weight, blood pressure, cholesterol
- Rate: net daily calories, pace
- Performance: distance, sleep, nutrition

Wealth examples

- Vitals: debt, savings, rainy day fund
- Rate: savings rate, debt repayment
- Performance: promotion, job rating

My focus area will be: \_\_\_\_\_

### 7 MONTH 2: MEASURE & ASSESS

Snapshot (date: \_\_\_/\_\_\_/\_\_\_):

### 6 MONTH 1: MEASURE & ASSESS

How are you doing versus your goal?

Identify variances; diagnose root causes. If ahead, consider pushing out your finish line. If behind, consider changing your plan or finish line

Snapshot (date: \_\_\_/\_\_\_/\_\_\_):

### 5 INVEST

Make investments to realize your plan

- Time: weekly 1:1 with yourself
- Knowledge: Network, hire coach, take course
- Tools: apps, gear
- Relationships: join community, get buddy

My investments:



## GET ON TRACK

A step-by-step planner to help you achieve your health and/or wealth goals

### 1 GET MOTIVATED

In a sentence, describe your life's purpose (don't fret if it's not perfect; you can change it any time)

"I live to \_\_\_\_\_."

HEALTH ►

WEALTH ►

### 3 MARK START & FINISH LINES

Where are you today?

Where do you want to be in 3 months?

Baseline measure:

Goal measure:

### 4 BUILD TRAINING PLAN

List steps to help you reach the finish

Start each with verb (e.g., "Learn how to," "Practice," "Reduce," "Increase," "Get feedback on," etc.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_