



Dream Journal

In our fast-paced world, taking time to dream may seem counterintuitive. However, dreams play a crucial role in shaping our lives, especially when it comes to our financial goals and aspirations. By envisioning our desired future, we can create a roadmap that guides us toward success.

Overview

This worksheet is a snapshot of some of the work I do with my clients to help them create a vision for their financial future. I hope it helps you start your own journey...

Dream for Your Future

Visualize

Take a moment to visualize your “Dream Life” in the upcoming years or all the way to retirement.

Key Information

Where do you live?
What do you spend your time doing?
Who’s there?

Tap Your Senses

Take a deep breath, close your eyes and really sense your surroundings—how does it: Look? Sound? Smell? Taste? Feel?

Next Steps

Now, list three simple things you need to have by then to make your Dream Life a reality.

(Examples: own my home outright, have money invested for income, have a travel fund set aside.)

- 1.
- 2.
- 3.

What is the first thing you need to do – something you can start doing this year – to move towards those three goals?

(Examples: make a plan to get out of debt, start a monthly spending plan that includes savings, etc.)

Support Needed

Helpful tool: A budget. Which is simply a plan that will little by little, one step at a time, move you towards your dream life.

If you’re not sure where to start with your budget, how to make changes for your current life, or what steps to take towards your dream life, set up a consultation with me using this QR code:

