



2023

Goal Setting Worksheet

The Big Picture



Mission and Vision

Blank space for writing Mission and Vision.

End of Career Goals

Large blank space for writing End of Career Goals.

Outlining Needs and Wants

<p>Needs:</p>	<p>Wants:</p>
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Stating Values

Five values that are important to you:

1.
2.
3.
4.
5.

Setting Your Course



10 Year Goals

Today's date:

Transactions:

Volume:

Net profit:

Other goals:

How you'll get there:

5 Year Goals

Transactions:

Volume:

Net profit:

Other goals:

How you'll get there:

Setting Your Course



3 Year Goals

Transactions:

Volume:

Net profit:

Other goals:

How you'll get there:

End of Year Goals

Transactions:

Volume:

Net profit:

Other goals:

How you'll get there:

The Right Now



3 Month Goals

Blank area for writing 3-month goals.

6 Month Goals

Blank area for writing 6-month goals.

9 Month Goals

Blank area for writing 9-month goals.

The Right Now



Obstacles and Actionable Solutions

To-Do List

Obstacle:	Solution:

To-Do List
