

Worksheet

Your Year in Review
Goal Worksheet



Goal Setting Activity

To plan for the year ahead you need to get clear on what's been going on this year - the good and the not so good so we can learn the valuable lessons.

Firstly, let's start with what you have done right - what have you achieved this year? What's going well? What are you most proud of? What do you want to celebrate? Write it all down...

Take a moment to think about how you were behaving to achieve these things. What kind of things did you do? Really think about your behaviour, habits and attitude and write about the part of you that created this success.

Goal Setting Activity

Let's look at the not so good stuff. What didn't go well for you this year? What did you want to achieve, but didn't? What frustrated you the most? What behaviours and attitudes contributed towards this?

It is time for a planning session. Take some time to think about what you want to make happen in the next year. What do you want the year to look like? Imagine it's the end of the year, what would you love to have happened? Dream big and write down what you want.

Let's break down your goals into quarterly goals for the year ahead. What do you want to achieve in Q1, Q2, Q3, Q4?

Q1

Q2

Q3

Q4

Goal Setting Activity

Remember these are your financial goals:

Try a good mix of short term, medium term and one long term goal.

Short term goal to be achieved by December 2026

Medium term goal achieved by December 2027

Long term goal (What do you want to achieve in the next 10 years?)

Goal Setting Activity

Now let's break down those goals into actionable steps:

Short term goal:

What monthly commitment/action do I need to change to reach this goal?

What will achieving this goal do for me?

What will not achieving this goal do to me?

Goal Setting Activity

Medium term goal:

What monthly commitment/action do I need to change to reach this goal?

What will achieving this goal do for me?

What will not achieving this goal do to me?

Goal Setting Activity

Long term goal:

What monthly commitment/action do I need to change to reach this goal?

What will achieving this goal do for me?

What will not achieving this goal do to me?
