

Goal setting

List 1-3 objectives in each area of your life, the steps you'll take to achieve them and the goal timeframe:



Lifestyle objectives

(e.g. regular holidays, dining out, holiday house)

Next steps

How to achieve the objective

Timeframe

How long to reach your goal



Investment objectives

(e.g. pay off mortgage, fund education, retire early)

Next steps

How to achieve the objective

Timeframe

How long to reach your goal



Retirement objectives


(e.g. retirement income, travel)

Next steps

How to achieve the objective

Timeframe

How long to reach your goal

Add more goals on the next page. 

Goal setting

List 1-3 objectives in each area of your life, the steps you'll take to achieve them and the goal timeframe:



Family protection objectives

(e.g. income for family in case of injury or death)

Next steps

How to achieve the objective

Timeframe

How long to reach your goal



Are there any immediate financial goals you can think of?

Next steps

How to achieve the objective

Timeframe

How long to reach your goal