

what are
your most
important
goals?

A topographic map is the background, showing contour lines and various geographical features. A black compass is positioned on the right side of the map, with its needle pointing towards the top. A red rope is coiled on the left side of the map. The text "what are your most important goals?" is overlaid on the top left. The "investblue" logo and tagline "it's possible." are in the bottom right corner.

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it's possible.



goals

We all know goal setting is an important part of living a fulfilled life. With clear goals we can focus our efforts where it matters most to us. While the theory is great as a concept, few of us actually live it well in our daily lives.

In a world where we are bombarded by information and messages about the ‘ideal life’, what we should do with our time, what we should own, how we should live; it can be all too easy to get caught up on a journey that doesn’t exactly fit with who we are.

When it comes to setting financial goals, many people focus on a dollar saving goal or retirement date. We believe that financial goals are really about your life.

What is most important to you? Is it living in the now or saving for later? Are you mostly focused on feeling secure and comfortable, or do you want to live a life of adventure and freedom? What do those words even mean to you?

These are the types of questions we ask our clients when we set out to understand what matters most to them.

When you have clarity of your personal goals, and what is most meaningful to you; you can then construct a financial plan that makes sense to you.

“It’s all too easy to get stuck in the work to live cycle, rather than living with intent.”

So lets get started – there are no right or wrong answers here, grab a bevvie and start making some notes

list your goals

List out any goals you have, be as descriptive as you can and set a deadline for achieving them – pick a date, estimate associated costs (\$ or time)

my goals



1. living in the 'now'/Lifestyle
Home
Family
Community/Giving back
Health
2. Earning/Work/Career/Knowledge
Adventure/Travel
Social/Friends
Security
Lifetime dreams, big aspirations
3. Something for you (learn, create, share or teach)
- 4.
- 5.
- 6.

goal 1.

Deadline _____ 24

Cost _____

Time _____





goal 2.

Deadline _____ 24

Cost _____

Time _____





goal 3.

Deadline _____ 24

Cost _____

Time _____





goal 4.

Deadline _____ 24

Cost _____

Time _____





goal 5.

Deadline _____ 24

Cost _____

Time _____



goal 6.

Deadline _____ 24

Cost _____

Time _____



why is that important?

3 reasons that is important to you

1.

2.

3.

1.

2.

3.

1.

2.

3.

1.

2.

3.

1.

2.

3.

1.

2.

3.



What might you have to give up or forgo to achieve this goal?



Are you prepared to make that choice?

y n

y n

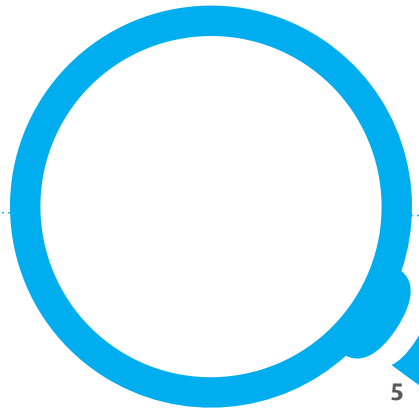
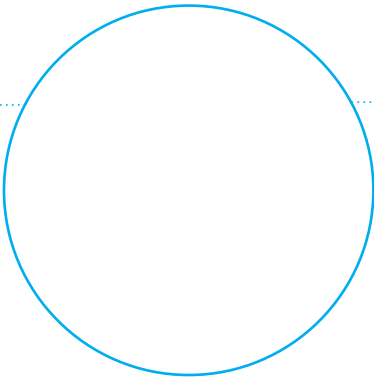
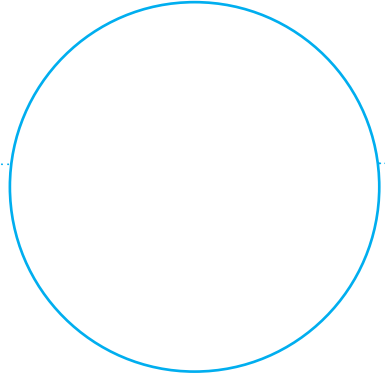
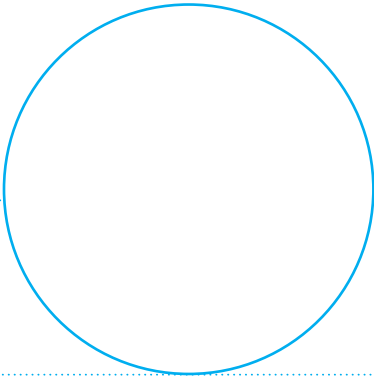
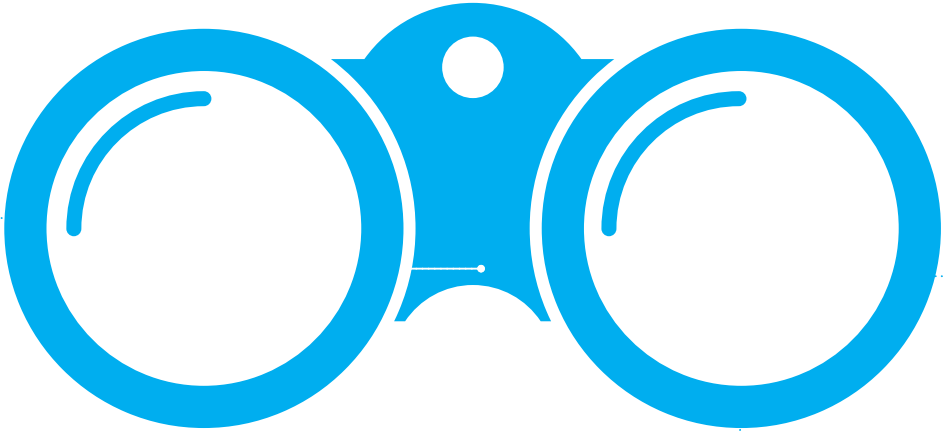
y n

y n

y n

y n

What will it look/feel like when I have achieved that goal?



What are my top 3 goals

1	2	3
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What are the key milestones I need to achieve along the way

1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.



To get there I will need to:

start doing		
stop doing		

Reality Check

Are there any factors that could impact your ability to achieve the goal outside of your control? Can you prepare for them?

y n