

Life's Goals

You may have read some of the countless books and essays on goal setting. Perhaps you currently use the techniques detailed in one of them. This brief exercise is not intended to replace any goal-setting process you currently use. It is designed to enhance it. For those of you who do not regularly set goals for yourself (and record them) use this as an exercise to start a regular process.

To complete this exercise, set and record three-month, one-year and three-year goals. Make the three-month goals the most practical and the most realistic. Include some ideals and perhaps some long-shots in your one-year and, especially in your three-year goals. Also, take the time to create a picture of your Ideal Life; this Ideal Life will serve as a beacon. It isn't necessary to edit Ideal Life each time you revisit your goals, although you will want to tweak it now and again. Your ideas may change as your life changes.



In some way, your decision to work as a Financial Professional inside the Credit Union consciously or unconsciously supports your vision of an ideal life.

Remember: goals are not static. They are meant to evolve with our ever-increasing awareness. Our perceptions, wants and desires are constantly changing. Therefore, as you progress through this process you may look back at what you have recorded and feel that these thoughts are no longer representative of your current goals. Being aware of these shifts is an important step in attaining your balanced lifestyle.

When doing this exercise, look for ideas which encompass all aspects of your life. Professional goals are important but are often not achieved if they are not accompanied by some lifestyle objectives. Most people are motivated by what working can produce for them -- free time, travel, fine dining, or a new house -- or by the benefits that it can bring for your family and community. When you do this exercise don't hesitate to include any goals and objectives which will be a by-product of greater organization and efficiency.

While it is important to include information from all aspects of your life, it is equally important to be succinct. Don't spend more time on your goals than is necessary. In other words: don't over think it. Try setting aside 15 to 25 minutes and stick to your deadline. You should repeat this process every three months - so you don't need to spend hours on the process each time. With each quarterly review, you will get a keener sense of what is important to you and to articulate it with greater clarity.

The process is what's important; **it is a proven fact that people who set goals and believe in them achieve more.** You can think of the simple analogy of following a road map and, therefore, knowing exactly where you are going. You are more likely to get there. And, if you change your mind about where you are going you can easily re-plot your course.

Worksheets found in this strategy will allow you the opportunity to record your Life's Goals and your Ideal Life profile.