



Goals Worksheet

How to use this worksheet

Dream big

Start by brainstorming all the things you'd like to do or achieve that will need money and planning. Don't hold back - write everything down, no matter how ambitious. This is your chance to dream big without worrying about what's realistic.

Choose your priorities

From your list, pick 3 to 5 goals that feel most important to you right now. Don't worry about the "how" yet - just focus on what matters. Write each one in a 'My goal is' box on this worksheet.

Set a target date

To bring your goals to life, give each one a meaningful date. This could be a retirement date, a birthday, an anniversary, or simply a date five years from today. Include the day, month, and year next to each goal.

Work out the cost

Think about how much money you'll need to achieve each goal. You might need to do a little research, but having a clear number makes planning easier. Write this amount next to each goal on your sheet.

Imagine the outcome

Close your eyes and picture yourself achieving each goal. What are you thinking? How do you feel? What difference has it made in your life? Capture these feelings in two or three words or short phrases next to your goal.

What next?

Now that you've captured your goals, dates, costs, and how achieving them will feel, it's time to take action. Look at your goals regularly, review your progress, and think about the small steps you can take today to move closer to them. Planning and saving bit by bit will bring your dreams to life.

If you'd like expert guidance to turn these goals into a clear financial plan, get in touch with us. Call 01509 610472 or visit www.chestertonhouse.co.uk/book-a-meeting.

Example goal:

My goal is	
Example: <i>Retire at 55</i>	
Target Date	Amount needed
Example: <i>20th July 2037</i>	Example: <i>£45,000 per year income</i>
Two or three words to describe the feeling and thoughts I will have when this is achieved	
Example: <i>Relieved, free, reassured</i>	



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Amount needed

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