



2021

GOAL SETTING

— WORKBOOK —

PERSONAL EDITION



LIFT YOURSELF IN 2021

It's a new year, and a new opportunity to plan for success. Success in life, both personally and professionally should be intentionally planned. We believe the more intentional we are with what we want to accomplish, the higher likelihood of achieving our goals. This book will provide you the template for developing your plan.

Goals:

A goal is the desired result that you seek to achieve because of implementing strategies and intentions. A goal:

- ◆ Defines the destination
- ◆ Changes the direction or mindset to move towards a new destination
- ◆ Creates the necessity to develop specific tactics

Strategies:

Often confused with goals, strategies are the building blocks/stepping stones to achieving a goal. Strategy, which is derived from ancient Greek for "generalship," is the method or plan that is executed to bring about a desired future, the goal. Strategies are the specific projects or tactics to get from where you are to where you want to go.

In the planning process, we recommend you work 90-day strategies. There is no limit to the number of strategies, but recommend no more than 3 every 90 days. Keeping in mind that 3 every 90 days is a total of 12 strategies for the year. Consider your bandwidth and resources before the plan is finalized.

Action Items:

Stated simply, this would be the step-by-step actions or activities that must take place for a strategy to be implemented. A list of action items should be identified and then organized in the order they should be executed.

All the best to you and have a terrific 2021!





LET'S GET
STARTED

FT YOUR AWARENESS

2020 SELF EVALUATION.....

Be honest with yourself in reviewing your challenges and successes in 2020

What were your successes last year?

What were your most proud accomplishments last year?

What did you hope to accomplish, but did not, and why?

What were some surprises and learnings from the year?

*What were some of your biggest challenges from the year?
Are they still a challenge, or did you overcome?*

SETTING PLANS FOR 2021.....

Looking at the future and making a plan takes commitment and focus. Be honest with your intentions.

What are your professional intentions for 2021?

What are your personal intentions for 2021?

What will be your daily/weekly habits to achieve your personal & professional plans? How will you hold yourself accountable to this plan?

*"If you don't know **where** you're going, you'll end up **someplace else.**"*

- Yogi Berra



LIFT YOUR GAME

MAKE YOUR PLAN FOR THE 5 KEY AREAS IN YOUR LIFE

PROFESSIONAL · HEALTH · LEARNING
FINANCES · RELATIONSHIPS

1. Determine goals for the 2021 year. Set 1-3 strategies for each goal every 90 days
2. Identify the action items necessary to implement your strategies
3. Evaluate your progress every 90 days, make adjustments, and plan your next 90 days

PROFESSIONAL GOALS.....

90-Day Time Frame: _____
Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

When will I evaluate, schedule and plan the next 90-days _____

HEALTH & WELLNESS

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

When will I evaluate, schedule and plan the next 90-days _____

INTELLECTUAL & LEARNING

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

When will I evaluate, schedule and plan the next 90-days _____

FINANCIAL SECURITY

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

When will I evaluate, schedule and plan the next 90-days _____

RELATIONSHIPS & BALANCE

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

When will I evaluate, schedule and plan the next 90-days _____

List of Strategies to select from to make your planning easier:

1. Set a consistent schedule for daily exercise, committing to move my body every day.
2. Make my health a priority, including making appointments for wellness checks and testing, to ensure I'm providing myself and my family the healthiest version of me.
3. Commit to start or continue an exercise regimen and food plan that is realistic and improves my overall health.
4. Join a sports team/league to get into physical shape and expand or maintain competitive team interactions.
5. Explore mental health needs for myself and my family, pulling in support where needed.
6. Determine the right work schedule for me and stick with it. Meaning, when I do what, when I start and end, where I do my best work, when I take breaks, etc. – to ensure I am achieving my professional and personal goals.
7. Work on better sleep habits to improve my health – by managing my routines, schedule, and patterns.
8. Give something up. Evaluate a bad habit, practice or spending habit to eliminate this year, come up with a plan for success and replace my bad habit with a positive one.
9. I will increase my learnings and skills by dedicating \pm 3 hours per week engaging with online learning resources – such as podcasts, audible books, online courses, and other knowledge-based resources.
10. Read \pm 12 books in the year (at least one book per month).
11. Learn something new. This could be either in work-life or personal-life. Carve out time each month to dedicate towards this new skill or learning.
12. Start a blog or journal weekly writing practice. Capture things such as: dreams, memories, history, gratitude, human interactions, or other thoughts and intentions.
13. Schedule time every day/week for personal meditation, reflection and learning.
14. Set a monthly budget and commit to keeping it.

List of Strategies to Implement into Personal Development & Wellness Plan Continued:

15. Obtain a copy of my credit report and correct any errors, then use the report to build a plan to begin paying down debt. I will pay off \$_____ monthly.
16. Increase my overall savings & investments by committing to save $\pm 10\%$ of my earnings.
17. Determine a minimum of three financial goals (i.e., saving for a down payment, purchasing a car, or investing) including likely roadblocks, as well as actionable steps required to meet my goals.
18. Dedicate myself to creating work-life harmony by diligently ensuring there is time every day to feed myself professionally and personally.
19. Work as a household to declutter or organize our home. Donate excess when possible or dispose of broken or obsolete items.
20. Tend to personal relationships, carving out _____ hours per week to touch base, connect, and reinforce the importance of those relationships.
21. Pledge to eating dinner as a family (whatever family means to you) at least _____ times per week.
22. Allocate _____ hours per week for one-on-one time with my spouse, partner, and children doing something that connects and brings us peace. This can be going for a walk, sitting down for an uninterrupted coffee break, starting a new hobby together, or anything else that we find enjoyable.
23. Plan, save for, and take that dream vacation with those I love.
24. Commit to, or enhance, my involvement with a charity or cause that matters to me via donations or volunteering.
25. Join a club, community, or networking group to establish new friendships and/or build connections that can provide an opportunity to advance professionally.
26. Bring a pet into the household this year.
27. Get my financial house in order by setting up a personal will, or trust, this year.

NOTES



CREATING EXPERIENCES THAT MATTER

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