

GOALS WORKSHEET INSTRUCTIONS

On the reverse side is a matrix designed to assist you in defining and setting short, intermediate, and long term goals in 6 distinct areas of your life. The following are instruction guidelines to assist you in completing this exercise. Please read all the way through before starting!

When setting the timeline for achieving goals, generally short term goals are 1 week to 1 month out, intermediate term goals are 1 to 5 years, and long term goals are 10 or more years. For purposes of this exercise, you set the time frame that works best for you. A long term goal for you might be related to the period of time when you expect to retire or to an earlier point in time.

After you have determined your timeline, you can begin identifying your long term goals for each category. Long term goals can be discussed generally such as “travel the world” or “sufficient money to fund my activities in retirement and contribute to savings for grandkids”.

Next determine your short term goals. What is a specific step you can take towards the long term goal? Short term goals are specific action steps and should be more detailed than the long term goal, measurable, and have a definite time frame. For example, before you can become a world traveler, you might want to complete and mail your application for a passport. If you are wanting to fund your retirement, you would budget to set aside specific amounts, follow the schedule set, and also schedule a meeting with a financial planner.

Finally determine your intermediate term goals. These goals can be less specific than the short term goals but should be more specific than long term goals. Again, you will want these goals to be measurable. For example, after you have received your passport, you may want to complete a course within a year that refreshes your high school French or Spanish. For retirement you might want to identify who could take over your practice and what amount you will have saved within an identified range over 5 years.

Now you are ready to begin. You will be completing this form twice. The first time, complete as much of the worksheet as you can in 10 minutes. Try to set out all your long term goals and at least one short term goal per category. After the 10 minutes are up, wait at least a day and then go back through the worksheet to fill in all of the segments, taking as much time as you need.

Keeping Your Law Practice On Track 2018 • Planning Worksheet 3

GOALS WORKSHEET

DATE COMPLETED: ___ / ___ / ___

	SHORT TERM	INTERMEDIATE TERM	LONG TERM
Professional			
Personal			
Family			
Social			
Financial			
Spiritual			