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# PERSONAL GOAL SETTING **WORKBOOK**





CREATING  
EXPERIENCES  
THAT MATTER™



## GOAL PLANNING—ADVICE TO GET YOU STARTED

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 a person/organization seeks to achieve because of implementing strategies and intentions. A goal:

- > Should be a simple statement
- > Can be measured
- > Identifies the outcome or new destination

### STRATEGIES

Often confused with goals, strategies are the 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.

### ACTION ITEMS

These are your to-do's that are necessary for a strategy to be achieved. Action items should be prioritized, assigned, and given a completion date. Actions should be reset every 90-days to make your goal manageable throughout the year.

This workbook is designed to aid you with the process of personal goal setting and development. A good plan that is fully executed today is better than a perfect plan that gets crafted tomorrow - let us help you get started today!

Keep in mind, a goal could be a year-long (or more) achievement. It's the strategies and action items that should be evaluated and adjusted every 90-days.

**HERE'S TO A TERRIFIC YEAR AHEAD!**



# LET'S GET **STARTED**

BOOST YOUR  
**AWARENESS**

# SELF EVALUATION

Be honest as you look back at the previous year. The intention of this exercise is to identify the key habits, disciplines and activities you want to carry into the year ahead and which ones you need to leave behind.

1. What were your successes, what went well?

2. What were the challenges, what didn't go so well?

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

4. What were your 3 top moments or things that brought you joy?

# SELF EVALUATION CONT.

5. What were 3 things that drained your energy or focus?

6. What is one thing you will do differently, and why?

7. What skills and talents do you use the most?

8. How did you prepare and plan for your days/weeks?

# SETTING PLANS FOR THE YEAR AHEAD

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

1. List 3-5 of your personal values

2. List your key priorities and how you will time-block

3. What does professional success look like to you?

4. What does personal success look like to you?

5. If you could focus your time and energy in one area, what would it be and why?



**FOCUS  
ON THE GOAL  
NOT THE  
OBSTACLES**

# RAISE **YOUR GAME**

**MAKE YOUR PLAN FOR THE  
5 KEY AREAS IN YOUR LIFE**

**PROFESSIONAL • HEALTH • LEARNING  
FINANCES • RELATIONSHIPS**

**(or other personal aspirations)**

- Set a goal for the year in each category - remember a goal should be simply stated and measurable
- Identify the strategies and action items that you want to fuel your goal
- Work in 90-day increments, analyzing and adjusting your strategies and action items every 90-days where needed.



# PROFESSIONAL GROWTH

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:

# HEALTH & WELLNESS

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:

# INTELLECT & LEARNING

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:

# FINANCIAL SECURITY

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:

# KEY RELATIONSHIPS

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:

# OTHER PERSONAL GOALS

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

List your strategies for next 90-days:

List your action items to accomplish the strategies:

List any strategies/practices that you will continue doing:



# STRATEGIES TO ACHIEVE **PERSONAL GOALS**

The following pages are designed to assist you with developing your plan. These may inspire you to incorporate into your plan, or simply spark an idea to write your own.

**Financial security means having enough money to meet your needs and achieve your goals. It can help you live comfortably, confidently, and stress-free. Here are strategies that can help you improve your financial security:**

- 1. Create a budget.** A budget can help you track your income and expenses, identify your needs and wants, and prioritize your spending. It can also help you avoid overspending, debt, and financial stress.
- 2. Build an emergency fund.** An emergency fund is a savings account that you use only for unexpected expenses, such as medical bills, car repairs, or job loss. It can help you avoid using credit cards or loans to cover emergencies, which can increase your debt and interest payments. Ideally, you should have enough money in your emergency fund to cover six months of living expenses.
- 3. Pay off high-interest debt.** Debt can be useful for buying things that you need or want, but it can also cost you a lot of money in interest and fees. High-interest debt, such as credit card debt, can quickly grow and eat up your income. To reduce your debt, you should pay more than the minimum payment each month, focus on paying off the highest-interest debt first, and avoid taking on new debt.
- 4. Save for retirement.** Saving for retirement can help you achieve financial security and independence in your later years. Contribute regularly to a retirement account, such as an IRA or a 401(k), take advantage of employer matching and tax benefits, and invest your money wisely.
- 5. Invest in yourself.** Investing in yourself means spending money on things that can improve your skills, knowledge, health, and happiness. This can help increase your income potential, enhance your career opportunities, boost your confidence, and help you enjoy your life more. Examples include: taking a course, reading a book, hiring a coach, joining a gym, or traveling to a new place.
- 6. Live frugally.** Many people aren't aware of how much they spend and save each month, much less each year. When you sit down and calculate your current debts, monthly expenses, and expenditures in each category, you'll get a much better picture of where you can cut back. By being mindful of how we spend our money, we can reap numerous rewards such as improved financial security, increased savings, fewer debts, and more freedom overall.
- 7. Protect your assets.** Taking steps to prevent or reduce the loss or damage of your valuable possessions can help you avoid financial hardship and stress in case of accidents, disasters, thefts, lawsuits, or other risks. Examples include: buying insurance policies, creating an estate plan, setting up trusts or LLCs, or securing your home or business.
- 8. Set financial goals.** Decide what you want to achieve with your money and how you plan to get there. Write them down and refer back often. It will help you stay focused, motivated, and disciplined with your finances.
- 9. Review your finances regularly.** Reviewing your finances regularly means checking your income and expenses, savings and investments, debts and credit score, and financial goals and progress. It can help you monitor your financial situation, identify any problems or opportunities, and make adjustments as needed. You should review your finances at least once a month or whenever there is a significant change in your life.
- 10. Seek professional advice.** Talk to experts who have the knowledge and experience to guide you with your finances. It can help you learn more about financial topics, avoid costly mistakes, optimize your strategies, and achieve better results.



Relationships are an essential part of our lives. They can bring us joy, support, and growth, but they can also be challenging, stressful, and frustrating. To have healthy and happy relationships, we need to work on our communication, understanding, and trust. Here are strategies that can help you improve your relationships with others:

- 1. Listen actively.** Listening is more than just hearing what the other person is saying. It also involves paying attention to their body language, tone of voice, and emotions. Listening shows that you care about the other person and their perspective, and also helps avoid misunderstandings and conflicts.
- 2. Express yourself clearly.** When you want to share your thoughts, feelings, needs, or wishes with someone, be as clear and specific as possible. Use “I” statements to own your feelings and avoid blaming or accusing the other person.
- 3. Be respectful.** Respect means treating the other person as you would like to be treated. It means valuing their opinions, preferences, and boundaries. It also means avoiding name-calling, insults, sarcasm, or criticism that can hurt their feelings or self-esteem.
- 4. Show appreciation.** Everyone likes to feel appreciated and valued. Showing appreciation can strengthen your bond and boost your partner’s morale. You can show appreciation by saying “thank you,” giving compliments, expressing gratitude, or doing something nice for them.
- 5. Focus on your emotional intelligence (EI).** EI is your ability to recognize your own emotions, and better understand what they are telling you. By developing your EI, you’ll become more adept at identifying and handling the emotions and needs of others.
- 6. Establish quality time.** Carve out time without distractions or interruptions for your loved ones. It can be a date night, a walk in the park, a game night, or any activity that you all enjoy. Quality time can help you reconnect, have fun, and create memories.
- 7. Support your network.** Everyone wants to feel supported and appreciated. It means offering help, advice, comfort, or encouragement. It also means celebrating their achievements and cheering them up when they are down.
- 8. Schedule time to build relationships.** We need to make time for the things that are important to us. Even small interactions can lay the groundwork for strong relationships. For example, ask a colleague out for a quick cup of coffee, or comment on a post you enjoyed reading.
- 9. Be positive.** Positivity is contagious and people gravitate to those who make them feel good.
- 10. Develop your people skills.** People skills can improve your performance at work, create good first impressions, and help you build strong relationships in and outside of the workplace. Invest in a course or read a book to continually develop your skillset in this area.

## Expanding your knowledge can help you achieve your personal and professional goals. Here are some strategies you can try:

- 1. Set clear goals.** Having a specific and realistic goal can motivate you to learn and measure your progress. For example, you might want to learn a new language, pass an exam, or master a skill.
- 2. Use active learning strategies.** Active learning involves engaging with the material, not just reading or listening to it. You can use strategies such as summarizing, questioning, explaining, or applying what you learn.
- 3. Use different learning mediums.** Different mediums can stimulate different parts of your brain and help you retain information better. You can use mediums such as books, videos, podcasts, online courses, or games.
- 4. Learn from someone with more experience.** Learning from an expert or a mentor can help you gain insights, feedback, and guidance. You can learn from someone by taking a class, joining a community, or finding a coach.
- 5. Practice.** Practice makes perfect, as the saying goes. Practicing what you learn can help you reinforce your memory, improve your skills, and identify your mistakes. You can practice by doing exercises, quizzes, or projects.
- 6. Take frequent breaks.** Taking breaks can help you refresh your mind, reduce fatigue, and consolidate your learning. You can take breaks by following the Pomodoro technique, which involves working for 25 minutes and resting for 5 minutes.
- 7. Space out your studying.** Reviewing the new material at different intervals over time can help enhance your long-term memory. Try using flashcards or apps.
- 8. Test yourself.** Testing yourself is one of the most effective ways to improve your learning. It can help you check your understanding, recall information, and reduce test anxiety. You can test yourself by using past papers, online quizzes, or self-made questions.
- 9. Connect new information to things you already know.** Connecting new information to things you already know can help you make sense of it and remember it better. You can use techniques such as making analogies, examples, or associations.
- 10. Seek feedback.** Seeking feedback can help you identify your strengths and weaknesses, correct your errors, and improve your performance. You can seek feedback from your teachers, peers, or online platforms.

**Mental health is critical for your overall well-being. It affects how you think, feel, and act. There are many ways to improve your mental health, but here are a few strategies to choose from:**

1. **Make social connections — especially face-to-face — a priority.** Few things can beat the stress-busting, mood-boosting power of quality face-to-face time with other people, particularly those who energize you. Phone calls and social media are also great ways to stay connected, but do not replace the benefits of in-person connection.
2. **Get active.** Physical activity is as good for the brain as it is for the body. Regular exercise or activity can have a significant impact on your mental and emotional health, relieve stress, improve memory, and help you sleep better.
3. **Take up a relaxation practice.** Yoga, mindfulness, meditation and deep breathing can all help reduce stress levels.
4. **Consciously practice gratitude.** Studies show that a single act of thoughtful gratitude produces an immediate 10% increase in happiness, and a 35% reduction in depressive symptoms. Whether you keep a gratitude journal, count your blessings mentally, pray, or even write physical notes – a daily gratitude practice will pay dividends with your mental health.
5. **Don't skimp on sleep.** Sleep is our body and mind's best way to recharge and rejuvenate. Experts recommend 7-9 hours of sleep per night. Consider replacing screen time with reading or relaxing music before bedtime.
6. **Get some sun.** Exposure to natural light can regulate your circadian rhythm, improve your sleep quality, and lift your mood. If you live in a dark or cold climate, or during the winter months, try using a light therapy lamp.
7. **Eat a brain-healthy diet.** Research shows a link between what we eat and how we feel. Foods that may support your mood include beans, legumes, fatty fish rich in omega-3s, nuts, avocados, dark leafy greens, and fruit. Dark chocolate has also been found to be potentially beneficial for mental health.
8. **Laugh more.** It's true, laughter is strong medicine. Laughter strengthens your immune system, boosts mood, diminishes pain, and protects you from the damaging effects of stress.
9. **Talk to someone.** Talk to a friendly face. If you have concerns, stresses or worries, sharing these with someone who cares is one of the most effective ways to calm your nervous system and relieve stress. And vice versa: Sometimes listening to others in a safe and supported way can help you develop wider perspectives.
10. **Carve out creative time.** Express yourself creatively by trying a new recipe, writing, painting, or doing a DIY project. Creativity can improve your mood and mental skills.
11. **Find purpose and meaning.** This is different for everyone, but finding purpose in your day is a big factor to good mental health. You might try one of the following:
  - a. Engage in work and play that makes you feel useful
  - b. Invest in relationships and spend quality time with people who matter to you
  - c. Volunteer, which can help enrich your life and make you happier
  - d. Find ways to care for others, which can be as rewarding and meaningful as it is challenging
  - e. Think of one good deed or gesture to do each day

Personal aspirations reflect your deepest desires and passions. They are the goals that inspire you to live a fulfilling and meaningful life. Setting personal aspiration goals can help you discover your purpose and direction in life, express your creativity and uniqueness, achieve your full potential, and leave a lasting legacy.

Some examples of personal aspiration goals are:

- To travel the world and experience different cultures
- To write a best-selling novel or a hit song
- To start your own business or non-profit organization
- To become a spiritual leader or a motivational speaker
- To make a positive impact on the world or your community

Follow the steps below to help you identify and set personal aspiration goals:

1. **Identify your passions and interests.** What are the things that you love to do or learn about? What are the causes that you care about or want to contribute to?
2. **Visualize your ideal life.** How do you want to live your life in the future? What kind of person do you want to be? What kind of impact do you want to make?
3. **Write down your goals.** Be as specific and realistic as possible. Use the SMART goal method, where you apply specific, measurable, achievable, relevant, and time-bound objectives to help you reach your goals.
4. **Make a plan.** Break down your goals into smaller and manageable steps. Identify the resources, skills, and actions that you need to achieve each step.
5. **Take action.** Start working on your goals and track your progress. Celebrate your achievements and learn from your mistakes. Seek feedback and support from others who share your vision or have achieved similar goals.
6. **Explore your interests and passions.** What are the things that you enjoy doing or learning about? What are the causes that you care about or want to contribute to? Exploring your interests and passions can help you discover your talents, values, and goals. You can try new hobbies, join clubs or organizations, volunteer for a cause, or take online courses.
7. **Reflect on your life experiences.** What are the moments that shaped who you are today? What are the challenges that you overcame or learned from? What are the achievements that you are proud of or grateful for? Reflecting on your life experiences can help you understand your strengths, weaknesses, and growth areas. You can write a journal, create a timeline, or share your stories with others.
8. **Seek feedback from others.** What do other people see in you that you might not see in yourself? What do they appreciate or admire about you? What do they think you are good at or could improve on? Seeking feedback from others can help you gain new insights, perspectives, and opportunities. You can ask for feedback from your friends, family, mentors, or colleagues.

Physical health is very important for your well-being. It affects how you feel and perform — and can even prevent illnesses. There are many ways to improve your physical health, but here are a few tips to choose from:

- 1. Identify your passions and interests.** Get active. Regular exercise can benefit your heart, brain, mood, weight, bones, muscles, and chronic diseases. Aim for at least 150 minutes of moderate-intensity aerobic activity a week.
- 2. Eat more whole foods.** Whole foods are foods that haven't been processed or altered. They provide more vitamins, minerals, and essential nutrients than processed foods.
- 3. Maintain your muscles.** Building muscle helps you keep up the activities you enjoy at any stage of your life. It also keeps your bones and metabolism healthy. Do strength training activities for all the major muscle groups two or more days a week.
- 4. Find a healthy weight.** Keeping your body at a healthy weight can lower your risk of heart disease, type 2 diabetes, and certain types of cancer. Calculate how many calories you need for your weight goals and track your intake.
- 5. Sleep well.** Getting enough quality sleep is essential for your physical and mental health. It can improve your immune system, memory, mood, and productivity. Aim for 7 to 9 hours of sleep per night.
- 6. Stay hydrated.** Drinking enough water can help you regulate your body temperature, flush out toxins, lubricate your joints, and prevent dehydration. A general rule is to drink half your body weight in ounces of water each day (a 200-pound person should drink 100 ounces of water).
- 7. Limit alcohol.** Drinking too much alcohol can harm your liver, heart, brain, and other organs. It can also increase your risk of accidents, injuries, violence, and chronic diseases.
- 8. Don't smoke.** Smoking is one of the leading causes of preventable death in the world. It can damage almost every organ in your body and increase your risk of cancer, heart disease, stroke, lung diseases, and other health problems.
- 9. Get regular health screenings.** Regular check-ups can help you detect and prevent potential health problems before they become serious. They can also help you monitor your health status and track your progress toward your goals. Talk to your doctor about what types of screenings and tests you need based on your age, gender, family history, and lifestyle factors.
- 10. Manage stress.** Stress can affect your physical health in many ways, including headaches, muscle tension, fatigue, digestive problems, high blood pressure, and other symptoms. It can also weaken your immune system and make you more vulnerable to illnesses. Meditation, yoga, breathing exercises, hobbies, social support, and counseling can all help manage stress.

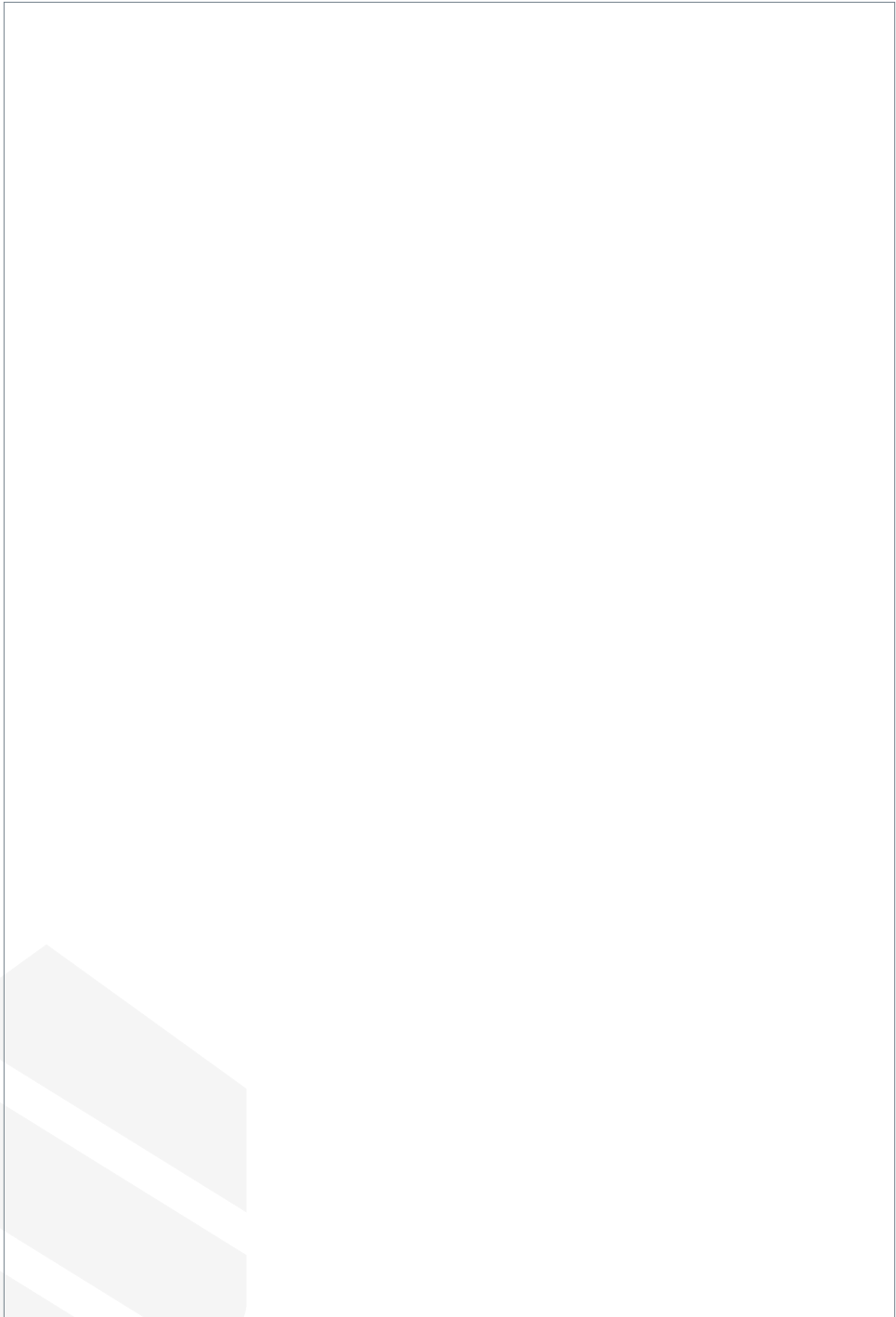
**Spiritual personal growth is the process of becoming more aware of your true self and your connection with the divine. It can help you find meaning, purpose, and peace in your life. Here are some tips that can help with your spiritual growth:**

- 1. Read spiritual books.** Reading books that inspire you and teach you about spirituality can expand your knowledge and perspective. You can learn from the wisdom and experiences of others who have walked the spiritual path before you.
- 2. Meditate daily.** Meditation is a practice that helps you quiet your mind and focus on your breath, a mantra, or an object. It can help you calm your emotions, reduce stress, and increase your awareness of yourself and your surroundings.
- 3. Pray or affirm.** Praying or affirming is a way of communicating with the divine, whatever you conceive it to be. You can express your gratitude, ask for guidance, or declare your intentions. Praying or affirming can help you strengthen your faith, align your will with the divine, and manifest your desires.
- 4. Practice gratitude.** Gratitude is the feeling of appreciation for what you have and what you experience in life. It can help you shift your focus from what you lack to what you have, from what is wrong to what is right, and from what is negative to what is positive.
- 5. Serve others.** Serving others is a way of showing compassion and kindness to those who are in need or less fortunate than you. It can help you develop empathy, generosity, and humility. Serving others can also help you discover your gifts and talents, and use them for a higher purpose.
- 6. Forgive yourself and others.** Forgiveness is the act of letting go of resentment, anger, or guilt that you hold against yourself or others for something that happened in the past. It can help you heal your wounds, free yourself from negative emotions, and restore your relationships.
- 7. Learn from challenges.** Challenges are the difficulties or obstacles that you face in life. They can be opportunities for growth and learning if you approach them with a positive attitude and an open mind. You can learn from challenges by asking yourself what they are teaching you, how they are helping you grow, and what you can do differently next time.
- 8. Connect with nature.** Nature is the manifestation of the divine in the physical world. It can help you feel the presence of the divine, appreciate the beauty and diversity of creation, and harmonize your energy with the natural rhythms of life.
- 9. Join a spiritual community.** A spiritual community is a group of people who share similar beliefs, values, and goals regarding spirituality. It can help you find support, guidance, and inspiration from others who are on the same journey as you.
- 10. Seek professional guidance.** Professional guidance is the advice or assistance that you get from experts who have the knowledge and experience to help you with your spiritual growth. It can help you learn more about spirituality, avoid common pitfalls, optimize your practices, and achieve better results.

**For additional information and strategies related to the categories of personal plans, you can visit:**

Healthline.com • Verywellmind.com • Psychologytoday.com  
Nih.gov • Kiplinger.com • Investopedia.com • Thejoywithin.org  
Successconsciousness.com • Verywellmind.com • Developgoodhabits.com

# NOTES



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