



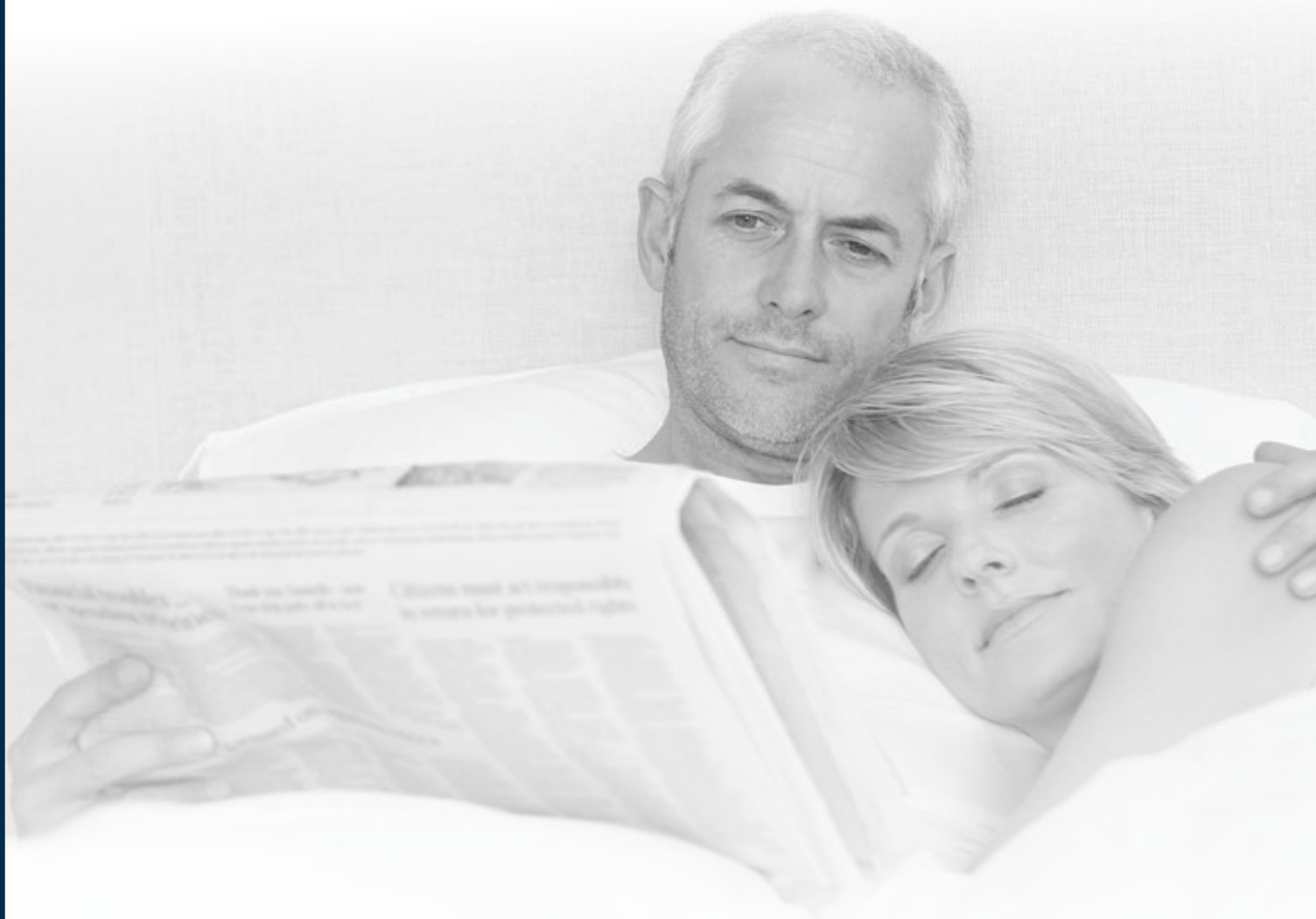
encompass

Lifestyle Planning

# SET YOUR GOALS...



...AND PLAN YOUR DESIRED LIFESTYLE!



Our Lifestyle and Goal Setting document has been taken from The Seven Stages of Money Maturity by George Kinder. Used by permission.

## 3 QUESTIONS THAT CAN CHANGE YOUR LIFE...

Each of the following 3 questions should be completed strictly in their logical order so that you will get the maximum benefit from our goal setting process.

Please only move onto the next question once you have given sufficient time and thought to the question.



# ASK YOURSELF...

Imagine if you received a **very large** cash windfall (for example, winning The National Lottery) and you had more money than you would **ever** need, you are financially secure and you have more than enough money to take care of your needs, now and throughout your life.

**What would you do differently to what you do now?**

**What things would you want to do, to have, and what would you want to achieve in your lifetime?**

**How would you live your life? Would you change anything that you do or have now?**

**What are your dreams?**



## NEXT...

This time you visit your doctor who tells you that, unfortunately, you only have 5 –10 years left to live.

The good part is that you won't ever feel sick.

The bad news is that you will have no notice of the moment of your death.

**What will you do in the time you have remaining to live?**

**What would you do differently, in the next 5-10 years?**



# THIS TIME...

You visit your doctor who **shocks** you with the news that you only have 24 hours left to live.

**What dreams will be left unfulfilled?**

**What do you wish you had finished or had been?**

**What do you wish you had done?**

**What did you miss?**

**Who did you not get to be?**

**What did you not get to do? What would you regret?**



# LIFESTYLE PLANNING AND GOAL SETTING...

Get the goals right and everything else falls into place. Clear thought, soul searching and **honesty** will be required. Here are some useful tips and pointers.

**Think about your relationships.**

**Consider work and economic matters**

**Write goals in present tense**

**Work back to decide on steps to get there.**

**Do you want and need the goals so much that you are prepared to do everything to achieve them.**

**Sort out the “must do” activities (to achieve your goals) the rest become incidental so you should do less and yet achieve more.**

**Make sure your goals are “SMART”.**

**S**pecific

**M**easurable

**A**chievable

**R**ealistic

**T**ime Based

This lifestyle questionnaire is specifically designed to be thought provoking and to help our clients define and achieve their life goals and to establish what is really, really important to them.

**There are 2 matrix grids which follow that are designed to help you focus on your goals and then to prioritise them, so as to give you the best chance of achieving your goals and aims in life.**



# LIFESTYLE PLANNING AND GOAL SETTING...

**It would Be Fun to:**

**I Ought To:**

**I Really Want To:**

**HAVE:**

**DO:**

**BE:**



# LIFESTYLE PLANNING AND GOAL SETTING...



	One Month	Three Months	One Year	Three Years	Five Years	Ten Years	Twenty Years	Lifetime
<b>Work</b>								
<b>Family</b>								
<b>Relationship(s)</b>								
<b>Sports / Hobbies</b>								
<b>Community</b>								
<b>Creativity</b>								
<b>Spirit</b>								

Guidance: (1) Put in your own categories in the row immediately above. Feel free to delete or modify any of the categories. (2) You do not need to fill in all the boxes in the table. It is best to fill in at least eight boxes. (3) Each row represents a goal that you wish to complete by the end of the timeline specified at the top of the column. (4) As you scan the blank table, move towards whatever box "calls out" to you, and fill in a goal for that box. Put the number 1 in the corner of that box, to denote it as your first priority. Then move towards another box that calls out to you, and fill it in with a goal, putting the number 2 in its corner. Continue in this fashion until you have completed eight or more boxes. (5) Remember: this exercise is a more intuitive than rational process. Whatever goals call out to you are "the right goals." Do not try to make the collection of goals fit into a coherent pattern.