

My 3-5-Year Goals

Name _____ Date _____

Two to ten goals should be established for each category. The goals need to be specific, measurable, and obtainable, some requiring a stretch.

Ethical/Spiritual Development – Goals involving the seeking of higher standards of conduct, morality, and spirituality. They may include religion study/growth and goals in serving others and/or a divine being.

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Social Development – Goals that involve the building and strengthening of relationships, friendships, and social conduct. Included are goals relating to social activities, social development, and community service.

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Physical Development – Goals related to physical health and appearance. Included are goals relating to eating habits, weight reduction/maintenance, exercise, sports participation, general health, physical appearance, and alcohol/substance use.

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Financial Development – Goals relating to retirement income/expenses, financial planning/preparedness, and overall financial health. This includes goals relating to net worth (assets/liabilities), investments, income, budgeting, debt reduction, insurance (life, medical, vision, dental), tax planning, estate planning, etc.

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Family Development – Goals that involving relationships with spouse and other family members. These include the planning of special times and events for interfacing with family members, building/strengthening relationships and creating greater levels of respect and understanding.

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Mental Development – Goals that challenge the mind and increase understanding of the world. Included are goals for building/maintaining mental acuity, expanding the mind, increasing mind/body coordination, learning a new skill, achieving new experiences, obtaining formal classroom training/education, developing an increased understanding and appreciation of music, the arts and sciences, etc.

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