



# Secret Money Business *for mums*

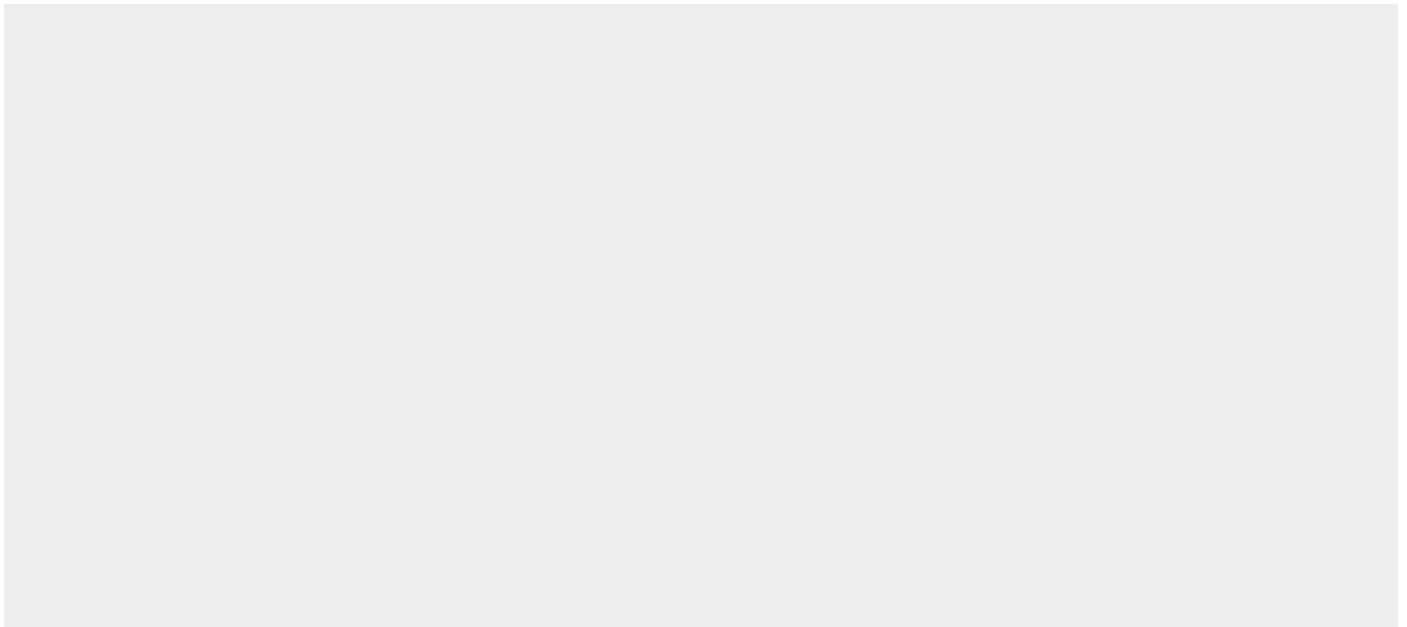
## LESSON 4 - WORKSHEET

Step by Step - Goal Setting Process

Use this sheet in conjunction with the Lesson 4 Workshop where I take you Step by Step through setting your financial goals.

### STEP 1 - WHAT DOES YOUR IDEAL FAMILY LIFE LOOK LIKE

Use this box to list ALL. THE. THINGS. that you envisage in your ideal family life. [E.g. Family home paid off, annual holiday, specific schooling, new car etc.]



### STEP 2 - CREATE YOUR FAMILY VISION BOARD

You can do this as a scrap book exercise if you are creative OR you can do this digitally by opening up a Word Document.

You can source images in hard copy from magazines and catalogues OR you use Pinterest, Google Images, Stock Photography websites or your own personal photos.

Refer to the Video Lesson for a step by step guide to creating your family vision board.

### STEP 3 - IDENTIFY YOUR FINANCIAL GOALS

Now that you've taken the time to identify with your ideal family life - you will now be aware of what your financial goals are (i.e. what are the specific things that these pictures represent?)

Write down the TOP FIVE Financial Goals for you and your family - based on your ideal family life picture using the GOAL SHEETS that follow.



## FAMILY FINANCIAL GOAL # 1

What will this mean for your family? [how will you feel, what will it bring etc]

What do you need to DO in order to make this goal a reality? Here is where you specify exactly what your goal is so you can measure your success.

What is your timeframe for achieving this goal?

Resources Needed: What tools do you need to make this happen

- (1)
- (2)
- (3)

To Do List: What do you need to do to start taking action

- (1)
- (2)
- (3)



## FAMILY FINANCIAL GOAL # 2

What will this mean for your family? [how will you feel, what will it bring etc]

What do you need to DO in order to make this goal a reality? Here is where you specify exactly what your goal is so you can measure your success.

What is your timeframe for achieving this goal?

Resources Needed: What tools do you need to make this happen

- (1)
- (2)
- (3)

To Do List: What do you need to do to start taking action

- (1)
- (2)
- (3)



### FAMILY FINANCIAL GOAL # 3

What will this mean for your family? [how will you feel, what will it bring etc]

What do you need to DO in order to make this goal a reality? Here is where you specify exactly what your goal is so you can measure your success.

What is your timeframe for achieving this goal?

Resources Needed: What tools do you need to make this happen

- (1)
- (2)
- (3)

To Do List: What do you need to do to start taking action

- (1)
- (2)
- (3)



## FAMILY FINANCIAL GOAL # 4

What will this mean for your family? [how will you feel, what will it bring etc]

What do you need to DO in order to make this goal a reality? Here is where you specify exactly what your goal is so you can measure your success.

What is your timeframe for achieving this goal?

Resources Needed: What tools do you need to make this happen

- (1)
- (2)
- (3)

To Do List: What do you need to do to start taking action

- (1)
- (2)
- (3)



## FAMILY FINANCIAL GOAL # 5

What will this mean for your family? [how will you feel, what will it bring etc]

What do you need to DO in order to make this goal a reality? Here is where you specify exactly what your goal is so you can measure your success.

What is your timeframe for achieving this goal?

Resources Needed: What tools do you need to make this happen

- (1)
- (2)
- (3)

To Do List: What do you need to do to start taking action

- (1)
- (2)
- (3)

