

MONTHLY PLANNING

Turn your goals into small, doable monthly steps

MONTH: _____

YEAR: _____

How to use this exercise

Start by defining a meaningful goal in each area and setting a due date for achieving it. Then, at the beginning of each month, decide what you can accomplish this month to move closer to that goal. Break it down into small, doable activities and focus on consistent progress.

1

PERSONAL LIFE

Health • Fitness • Personal growth • Spirituality • Hobbies

MY GOAL *What do I want to achieve?*

Goal: _____ Due date: _____

THIS MONTH'S GOAL / FOCUS *What can I accomplish this month to move closer to my goal?*

ACTIVITIES / SMALL STEPS THIS MONTH

1. _____
2. _____
3. _____
4. _____

2

RELATIONSHIPS

Partnership • Parenting • Family • Friends

MY GOAL *What do I want to achieve?*

Goal: _____ Due date: _____

THIS MONTH'S GOAL / FOCUS *What can I accomplish this month to move closer to my goal?*

ACTIVITIES / SMALL STEPS THIS MONTH

1. _____
2. _____
3. _____
4. _____

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3

WORK

Career • Professional growth • Business

MY GOAL *What do I want to achieve?*

Goal: _____ Due date: _____

THIS MONTH'S GOAL / FOCUS *What can I accomplish this month to move closer to my goal?*

ACTIVITIES / SMALL STEPS THIS MONTH

1. _____
2. _____
3. _____
4. _____

4

INVESTMENTS

Building your future financial well-being beyond work

MY GOAL *What do I want to achieve?*

Goal: _____ Due date: _____

THIS MONTH'S GOAL / FOCUS *What can I accomplish this month to move closer to my goal?*

ACTIVITIES / SMALL STEPS THIS MONTH

1. _____
2. _____
3. _____
4. _____