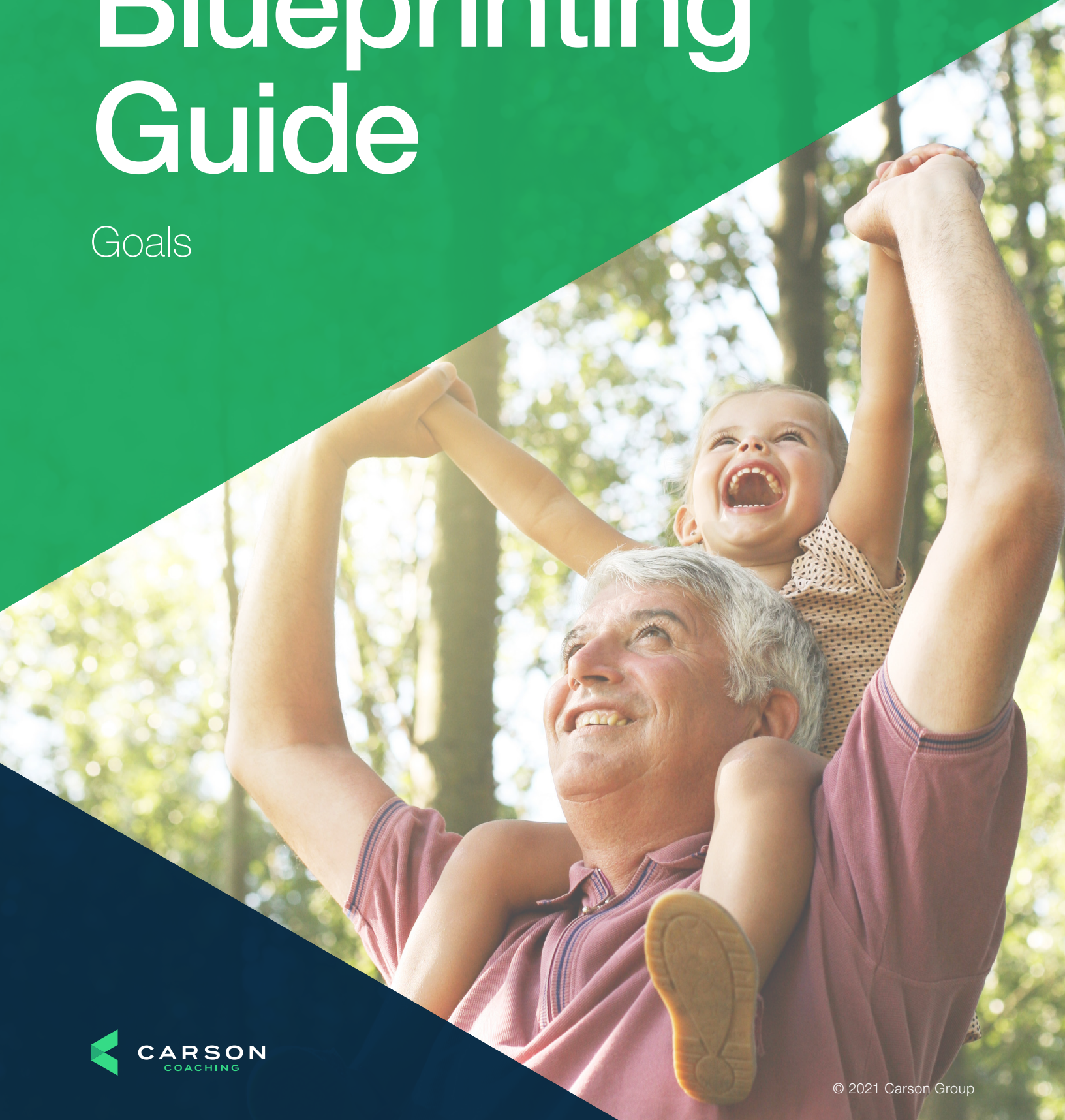


Client Blueprinting Guide

Goals





Goals

We all have wants and desires. We all daydream about what it would be like to be living our ideal life. But, merely thinking about our ideal life will not get us our ideal life. We have to be clear about what we want, when we want it, why we want it and we have to take positive action to make it happen. The goal-setting process is critical to making all this happen. As we set goals, make sure they are SMAC-certified: specific, measurable, achievable and compatible.

One of the keys to goal-setting is to tie them into your compelling vision. Your compelling vision is a lifetime pursuit. To make that manageable, you have to break it into pieces. To do this, complete the goal-setting and action-planning exercises. As you set goals, start by reviewing your compelling vision and then work backward. To pursue your vision, what has to happen in 10 years, five years, three years and one year? Determine what age you, your spouse, and your children will be at each of those time periods. Identify the goal, then determine the one activity that will have the greatest impact on reaching that goal. Also, identify the reward you will get by reaching the goal.



Set Short & Long-Term Goals

Here are examples of categories in which you might want to set goals:



- Attitude** – Are there any attitudes or limiting beliefs you need to change to reach your compelling vision?
- Career** – What do you want to accomplish in your professional life?
- Education** – Do you need additional knowledge that will help you pursue your vision?
- Family** – How can you improve your relationships?
- Financial** – What net worth are you striving for? What business financial goals do you have?
- Physical** – What specific physical goals can you set? Do you want to be a certain weight? Do you want to exercise a certain amount? Is there a challenging physical goal you'd like to achieve such as climbing Mount Rainier?
- Recreation** – What do you want to do in your free time that will rejuvenate you?
- Community** – What do you want to do for your community? What legacy do you want to leave?
- Spiritual** – How do you want to grow in your spirituality?

Directions:

On the following pages, write down your goals for 10 years out, five years out, three years out, and for the next year. Start with your 10-year goals. At a high level, what should you have accomplished to make your Compelling Vision for the Future a reality?

Next, complete your 5-year goals and 3-year goals. What needs to happen during the shorter-term periods to assure the longer-term goals are achieved?

Finally, complete your 1-year goals at a much more granular level. For your 1-year goals, you will include the actions that will cause the goal to be reached as well as a reward that will drive you when your motivation is low.

Sample: 1-Year Goals

My Age: 57	Spouse's Age: 52	Kids' Ages: 29, 27, 21
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Goal	Actions To Achieve	Reward
» Take a two-week family vacation in July	<ul style="list-style-type: none"> » Schedule on calendar » Meet with family to determine location » Book travel and hotels 	» Grow closer as a family, smiling faces, new experiences
<ul style="list-style-type: none"> » Exercise vigorously at least » Five days per week to lose » 30 pounds 	<ul style="list-style-type: none"> » Join the local health club » Get up by 5:15 a.m. » Hire personal trainer for six months 	» New \$2,000 wardrobe

10-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
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Goals

Actions to Achieve

#1

#2

#3

#4

#5

#6

5-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
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Goals

Actions to Achieve

#1

#2

#3

#4

#5

#6

3-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
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Goals

Actions to Achieve

#1

#2

#3

#4

#5

#6

1-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
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Goals

Actions to Achieve

#1

#2

#3

#4

#5

#6

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