

Personal Development Plan Worksheet

Goals

	TODAY	1 YEAR	3 YEAR	5 YEAR	10 YEAR
Revenue					
AUM/AUA					
# of Households					
Avg. HH AUM					
Team: Ops/Adv					
% Advisory Rev.					
Week/Days Off					
Personal					
Other					

SMAC Goal Format

- » **S - Specific** - The goal must be clear and defined.
- » **M - Measurable** - What does “done” look like?
- » **A - Achievable** - Within the capabilities of the team.
- » **C - Compatible** - Aligned with your mission, vision and value.

Prioritized Goal List (Top 10)

1	6
2	7
3	8
4	9
5	10

Top 3 Goals to Work on NOW

Goal 1

Why Important:

Obstacles:

Where I Am Now:

Skills Needed:

SMAC Development Goal(s) to Achieve Goal 1:

Misaligned Beliefs:

Resources Needed:

Goal 2

Why Important:

Obstacles:

Where I Am Now:

Skills Needed:

SMAC Development Goal(s) to Achieve Goal 2:

Misaligned Beliefs:

Resources Needed:

Top 3 Goals to Work on NOW (cont)

Goal 3

Why Important:

Obstacles:

Where I Am Now:

Skills Needed:

SMAC Development Goal(s) to Achieve Goal 3:

Misaligned Beliefs:

Resources Needed:



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