

Making Your Dreams Come True!

Create a plan for making your financial dreams a reality! Use this worksheet to set goals and outline a strategy for making your dreams come true. Start planning today!

Step 1: Define your goals

The first step to making your dreams come true is defining what you really want. Is it your goal to become a small business owner? To go back to college? To save \$100,000? To pay off your debts? To travel across Europe? Complete a separate worksheet for each one of your dreams. Write down the basic outline of your goal here:

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Step 2: Evaluate your goal

Take a moment to really think about your goal. Consider your motivations and the impact that this goal will have on your life. Talk to your spouse or family about this dream. Answer the following questions:

Why do I want this?

When do I want this goal to be achieved?

How will this goal impact my life?

What are the positives?

What are the negatives?

What does my family think?

Step 3: Set your objectives

A goal is simply something that you would like to happen. Objectives are things that you know you can accomplish to make your goal come true. Think about your dream: what will it take to make it come true? For example, if your dream is to buy a vacation home, your objectives would be to save for a down payment, research your options, find a real estate agent, work with a lender, and finally buy the home. Write down the basic objectives for your goal below:

Objective 1:

Objective 2:

Objective 3:

Objective 4:

Objective 5:

Step 4: Make a checklist

In this step, you should break down each one of your objectives into specific actions. What exactly do you need to do for each step? When you break down your goal into small pieces, it is easier to stay on track and accomplish your objectives. Using the vacation home example from Step 3 and the first objective to save a down payment, during this stage you would write down "Calculate how much I need to save, open a savings account, and save \$200 a month for 2 years." Write down each step here:

| | |
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| Objective 1 | |
| Step 1 | |
| Step 2 | |
| Step 3 | |
| Step 4 | |
| Step 5 | |
| Objective 2 | |
| Step 1 | |
| Step 2 | |
| Step 3 | |
| Step 4 | |
| Step 5 | |

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| Objective 3 | |
| Step 1 | |
| Step 2 | |
| Step 3 | |
| Step 4 | |
| Step 5 | |
| Objective 4 | |
| Step 1 | |
| Step 2 | |
| Step 3 | |
| Step 4 | |
| Step 5 | |
| Objective 5 | |
| Step 1 | |
| Step 2 | |
| Step 3 | |
| Step 4 | |
| Step 5 | |

Step 5: Make it happen!

Put a copy of this worksheet up on your refrigerator and monitor your progress each month. Now that you have broken your goal down into small steps, you should be able to see some progress pretty quickly. You can redo this worksheet and modify your objectives if something changes. Keep track of your progress each month until you achieve your dreams!