

Life Planning Worksheets

Sample 10-year plan (for 2025)

What (Goal)	When	Where	Why	How
Finances				
\$120,000 annual income	2022–25	In an organization that will benefit from my expertise	To reach my goal of working at upper management/executive level, to help attain financial goals, to provide better lifestyle for me and family	Continue professional development, apply for and obtain position at upper management/executive level, add more details on job search etc .
Rental income \$2,000 per month net	2024–25	In a major city	To increase household income and diversify investment portfolio	Half of mortgage principal paid off by using accelerated biweekly payments and adding 10% against principal yearly as per mortgage agreement
Etc...				
Social Life				
Do Bike for Cancer Research for local hospital	Fall 2025	Hospital Bike for Cancer Research	To give back to community and fight to find cure for cancer, to make me a better person	Register, find sponsors and train for this event
Monthly gathering of friends	2015–25, last Friday of each month	To be determined (restaurant, coffee shop, home)	To meet with friends I cherish and love and stay grounded	Organize monthly gathering; research locations the Wednesday before, send email Thursday morning with place/time details
Etc...				
Health				
Become a yoga instructor	2021–25	Local yoga studio; offer sessions at home	To be in touch with myself and continue a healthy practice, to give back by offering my expertise to those who wish to receive it	Advertise in local media, on Internet and with sign in my neighbourhood and in front of my house

Eat healthy	2015–25	Locally, and by eating at home more often	To be healthy, have a stronger immune system, be an example to our children, live longer, feel good and enjoy good quality of life	Find farmers' markets and grocery stores that offer organic and local produce, find butcher or farmer who sells organic meat, search Internet, ask local produce people where to find best healthy produce
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Spirituality

Family

Education

Profession/work

Leisure

Travel

Sample five-year plan (for 2020)

What (Goal)	When	Where	Why	How
Finances				
\$80,000 annual income	2021	Within the same organization and other departments, if not available, search potential leads in different organizations	To attain my income level goal and continue to provide a better life for me and my family, to give me a sense of worth and self-esteem	Continue professional development and start MBA program, work on professional networking, use social media sites such as LinkedIn
Rental income from new investment property (break even)	2021	Metropolitan area	To reach our financial goals by becoming landlords, owning property as an investment	Have rental income cover mortgage and expenses, find good-quality rental property, find good tenants
Etc...				
Social Life				
Do Bike for Cancer Research for local hospital	Fall 2021	Hospital Bike for Cancer Research	To give back to community, fight to find cure for cancer, make me a better person	Register, find sponsors and train for this event, allocate 2 days a week to finding sponsors and practise biking 30 km

Monthly gathering of friends	2021–25, last Friday of each month	To be determined each month	To foster the beautiful friendship that exists, it gives me pleasure to be in their presence, they are a great support group	Organize a monthly gathering, research locations the Wednesday before, send email Thursday morning with place/time details
Etc...				
Health				
Become a yoga instructor	2021	Local studio	To be in touch with myself and remain healthy	Register for Yoga Teaching Training program
Eat healthy	2021–25	Home – make the right choices no matter where we are, eat at restaurants less often	To be an example to my children, to live healthy lifestyle so I can have energy and stamina to accomplish dreams and goals	Find organic produce and meats
Family				
Education				
Profession/work				
Leisure				
Travel				

Sample one-year plan (for 2015)

What (Goal)	When	Where	Why	How
Finances				
Increase annual income to \$50,000	2016	Present place of employment	To pay bills, feed family and start saving a little	Continue working at present job while looking at training possibilities
Open TFSA	2016	My bank	To contribute and have my investment grow tax free to save to invest in income property	Have monthly automated withdrawals and invest any additional money I save, take on side contracts to maximize investments to save down payment to purchase first income property
Etc...				
Social Life				

Monthly gathering of friends	2016, last Friday of each month	To be determined each month	We love our friends and want to make time to see them more often	Allocate time to invite friends for monthly get-together
Etc...				
Health				
Yoga	2016	Local studio	Stay in touch with myself, relieve stress, keep healthy	Register for yearly membership, go at least twice a week
Eat healthy	2016	At home and when eating out	I want to be healthy for my kids, I care about my health	Quit social smoking, eat more vegetables, cut down on carbs and sugar
Family				
Education				
Profession/work				
Leisure				
Travel				

It was meant to be one of the suggestions we make.

Not sure if this was something you meant to fill in, or if it is the text that's to be added