

Year in Review

This is where you look back at your previous year to date and rank yourself in the seven "Life Accounts". The life accounts represent the areas that most significant areas that most people deal with in their daily lives. You can Adjust as required. For example, if you are not a Spiritual person, just put "NA" in the row, and you do not need to rank yourself or make goals in that area. In some areas, you may rank yourself, but have no plans currently to address that area - that is FINE! - it is about your priorities - not anyone else's.

In the Grade column, Rate yourself on a scale of 1 to 5 where you feel you are at TODAY with 5 representing that you are maximizing this area and 1 meaning that you need immediate improvement.

Where you are today is a sum of your past habits, successes, and failures. Review your year and think about what went well and what didn't.

Some ideas to help you with your annual review include:

1. Calendar review - Checkout your Outlook or Google calendar week by week to help you recall what has happened this year.
2. Photo review - Look at the photos in your phone starting January 1st.
3. Social Media review - Look at the social media posts you have done this year.

Life Accounts	Grade (1-5)	Notes (Describe why you feel this was an accurate ranking)
Spiritual		
Family		
Physical/Health		
Mental/Educational		
Social		
Financial		
Career		

Notes from my year review:

My top 3 successes this year were (and why):

My top 3 areas of improvement this year were (and why):

If you had to sum up your year into one sentence what would it be?

What was your ONE word for this year? If you didn't have one, looking back what do you think it was?

Note - This is a Word that stands out as a representative of what your previous year could be summed up as.

i.e. Train Wreck, Growth, Advancement, Progress, Backtrack, etc.

If you established one last year, put it here and be prepared to compare and contrast on how it really turned out.

Think of your year and try to choose a single word to sum it up. This is important, because when you plan for next year's goals, you will choose a Word you want to represent next year!

My Word for this past year:

Bucket List/Life Goals

Goal	Life Account?	Timeframe to Accomplish	Date Completed
<i>Describe the goal you wish to accomplish in detail.</i>	<i>Health, Family, Spiritual, etc.</i>	<i>Days, months, years?</i>	<i>Type date</i>

Mission Statement

Do you have a personal Mission Statement? If so, record it here. If not read below on how to create one:

Steps for Developing a Personal Mission Statement

Step 1: Identify Past Successes

Spend some time identifying four or five examples where you have had personal success in recent years. These successes could be at work, in your community, at home, etc. Write them down. Try to identify whether there is a common theme (or themes) to these examples.

Step 2: Identify Core Values

Develop a list of attributes that you believe identify who you are and what your priorities are. The list can be as long as you need.

Once your list is complete, see if you can narrow your values down to around five or six of the most important values. Finally, see if you can choose the one value that is most important to you.

Step 3: Identify Contributions

Make a list of the ways you could make a difference. In an ideal situation, how could you contribute best to: the world in general | your family | your employer or future employers | your friends | your community

Step 4: Identify Goals

Spend some time thinking about your priorities in life and the goals you have for yourself.

Make a list of your personal goals, perhaps in the short-term (up to three years) and the long-term (beyond three years).

Step 5: Write Mission Statement

Based on the first four steps and a better understanding of yourself, begin writing your personal mission statement.

<https://www.livecareer.com/resources/careers/planning/creating-personal-mission-statements>

New Year Goal Planning Notes

Career Goals

Examples Include:

1. Attend a Leadership Conference
2. Complete Leadership Certification Training
3. Get a Career Mentor
4. Add as required...

Social Goals

Examples Include:

1. Volunteer at Kid's School
2. Pick a committee to volunteer on at church
3. Give to homeless (make care packages)
4. Add as required...

Financial Goals

Examples Include:

1. Begin Tithe
2. Payoff \$x or x% debt or become debt free
3. Save \$x for dream home
4. Add as required...

Family Goals

Examples Include:

1. Schedule a one on one date each month (with each of the kids)
2. Schedule a night out with wife each month
3. Two family vacations this year
4. Add as required...

Physical/Health Goals

Examples Include:

1. Lose 20lbs
2. Jog 100 miles this year
3. Run in (2) 5ks
4. Add as required...

Mental/Educational Goals

Examples Include:

1. Read/Listen to (12) books
2. Listen to at least (3) podcasts each week
3. Attend (3) conferences on (something in your industry)
4. Add as required...

Spiritual Goals

Examples Include:

1. Read the bible daily
2. Spend an hour each day in nature
3. Meditate for 15 minutes each morning
4. Add as required...

Final Goals

Enter your final goals here once you have taken time to review your planning notes. Once they are recorded, use your mobile phone to record them in whatever voice memo app is available so that you can re-visit them during the year. Recording and listening to your goals regularly will be make a huge impact on your rate of success.

Career Goals
Social Goals
Financial Goals
Family Goals

Physical/Health Goals

Mental/Educational Goals

Spiritual Goals

Miscellaneous Goals