

## SUCCESS PLAN FOR:

**Mission:**

**Values:**

	Perfect Destination	3 Years:	1 Year:	90 days:
Personal				
Family				
Professional				
Financial				
Health				
Travel / Experiences				
Material				

See the second page 'Glossary' for detailed instruction on how to complete.

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How's your progress!? Share your results: [james@jameswhitt.com](mailto:james@jameswhitt.com)

Item	Description	Examples
<b>Mission</b>	What mission drives you each day?	My mission is to help one million people in the next 12 months to take ownership of their financial, physical and mental health.
<b>Values</b>	What values do you live by?	Integrity; Persistence; Positivity; Relentless work ethic; Gratitude
<b>Personal</b>	What goals do you have for you personally?	Learn Spanish for 15 mins each day for six months Attend Toastmasters every week for one year Volunteer at a homeless shelter once a month
<b>Family</b>	What goals do you have for your family?	Turn off mobile phone after 7pm each day Have a weekly date night with spouse Call parents once a week
<b>Professional</b>	What goals do you have for your professional success?	Bring in \$20k more revenue to the business in 12 months Reach Marketing Manager level by 20 May 2019 Enroll in Diploma of Financial Services and have it completed by 30 June 2020
<b>Financial</b>	What goals do you have for your financial success?	Have \$5k in savings by end of year Have share portfolio worth \$20k by 31 Dec 2019 Earn \$10k from second income stream by end of year
<b>Health</b>	What goals do you have for your physical and mental health?	Do yoga once a week for one year Run Boston Marathon in April 2019 Use <i>The 5 Minute Journal</i> every day
<b>Travel / Experiences</b>	What part of our great world do you want to enjoy?	Go whitewater rafting down the Zambezi River in 2020 Attend the 2019 Rugby World Cup Family ski trip in Jan 2019
<b>Material</b>	What material possessions do you want to own?	Buy 3+ bedroom house by Oct 2019 Buy standup paddleboard when my salary reaches \$70k Buy Mazda CX-5 when my share portfolio hits \$50k

*Some items may overlap so just use your best judgement to include it in the most relevant item. The most important thing is to have it written down. Adjust the Success Plan Template's row and column sizing as needed. For printing, A3 (i.e. tabloid size) paper is preferred over A4 (letter size). You do not need to fill out every row. Simply ensure you have a comprehensive, specific idea of what you want from all areas of your life.*