



Ideal Future Reflection Worksheet

Exercise: Envision your ideal future. What do you see and want for yourself in . . .

6 Months

1-2 Years

3-5 Years

5-10 Years

10-12 Years

Not sure where to start? Here are some areas to think about.

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| • Family Growth | • Education | • Starting a Business |
| • Housing | • Travel and Leisure Goals | • Giving & Philanthropy |
| • Vehicle Maintenance & Replacement | • Personal Hobbies & Milestones | • Lifestyle Goals |
| • Debt Reduction | • Inheritance/Legacy | • Relocation Goals |
| • Retirement | • Career Goals | • Major Life Purchases |