

12 MONTH
Financial
C O M P A S S

Planning for
WEALTH, HEALTH,
and **HAPPINESS**

I _____ will complete my written 12 month plan by _____

Because if I don't I will _____

This plan will be executed by _____

Want help putting together your Action Plan?

Tap below to join the discussion. See the goals & action plans of other real estate investors! Connect, collaborate and accelerate your real estate inside the Connected Investors Smart Forum.



Writing Goals

Start With Your Vision of Financial Success. **Comment your answers to the first 4 questions.**

By: (date)

I will: (A specific and measurable goal)

To accomplish this, I will give:

This is important because:

By: [Ross Hamilton](#) in [Wilmington NC](#)

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Add a comment

Your Vision of Financial Success

By: _____

I will: _____

To accomplish this, I will give: _____

This is important because: _____



Your Vision of Personal Success

By: _____

I will: _____

To accomplish this, I will give: _____

This is important because: _____



Your Witness

I pledge to hold _____ accountable for achieving the goals written above.

Your Signature

Your Witness

Your witness needs to simply ask you how you are doing with your “I will” statement, ask you what is holding you back to achieve your goal faster, then ask you what you are going to do to solve the issue holding you back. They are not to provide advice. Just ask and listen.

5 Years From Now

Only 3% of people have a written plan for their lives. you can not succeed without knowing what success is for you. Imagine traveling to a time five years from now. Visualize, hear and feel all that you will be experiencing at the time in.

Now write a movie of how your life will be in 5 years.

It is five years from now the year is _____ I am. _____ Years old.
I am in a loving relationship with _____

I am living in: _____

My home looks like: _____

Vacations I will take over the next 5 Years _____

My specific accomplishments in the last 5 years _____

What do you see happening in your life long term _____

How much money must I earn to live my life the way I wish

Year 5 _____ Year 4 _____ Year 3 _____ Year 2 _____ Year 1 _____

Overcome Your Fears

What are you not going to bring with you?
In order to reach my desired goal I will no longer:

Many times more important than a to-do list is a not-to-do list.
List out the top habits you are no longer going to do:

1.A. I will no longer: _____
1.B. Because if I do: _____

2.B. Because if I do: _____

3.B. Because if I do: _____

Overcoming Moments of Weakness

Breaking a habit is one of the most challenging mental exercises. There will be times when your mind will use tricks to convince you on why it is “OK” to fall back into a habit.
What will you do to stay on track?

Real Estate Investing Game Plan

There are basic building blocks of every real estate investing business.

1. How much money do you want to make over next 12 months?

2. What is your primary real estate investing strategy going to be?

3. How do you plan on finding investment-grade properties?

4. How do you plan to fund your real estate investments?

5. How do you plan on further building your connections / network?

6. Who do you need on your team?

Knowing that you have big goals for your real estate investing business, what do you need to achieve in order to get there?

What commitments must you make in order to become what you've set out to become?

What obstacles do you feel you will encounter while trying to achieve your goals for greatness?

What will you need to do to overcome these obstacles? Make a game plan before you actually encounter these obstacles and commit to being courageous in the face of these obstacles.

Strategic Plan

Alignment of Purpose With Passion - Personal Philosophy:

Every person has a personal philosophy, consisting of some rules adopted from one's parents, culture, religion, acquaintance, and so on. Generally speaking, these rules, as a body, are not well thought out and contain a wealth of inconsistencies and contradictions.

Legacy Statement: Your legacy serves as your life's defining statement. It serves a two-fold purpose. First it provides an overarching framework for all mission statements and goals to follow. Second, it answers the question, "What do I want to be remembered for?"

Mission Statement: A mission statement is a declaration of who you are, why you exist, and what you intend to accomplish. In business, the organizational mission answers the big question: "What is our business?" In personal planning, the question is "What is my life's business?" In both cases, the answer must define the reason for being.

Core Values: Our values act as our compass, guiding us through life's terrain. One certain way of knowing that you are living in accordance with your values is by defining guidelines and measurements for value-centered living.

Code of Ethics: Words quietly influence our attitudes and opinions. Codes of conduct, personal creeds, and pledges all reflect an effort to make sense of things, to organize behavior, and to better understand ourselves.

Lifetime Objectives: Your objectives should be written within the framework of your Legacy & Mission Statements. The key to any Personal Strategic Plan is to visualize your desired outcomes in advance. Be sure to write and rewrite your Lifetime Objectives as affirmations of the future you are working to realize.

Personal Board of Directors: A personal board will accelerate your progress by providing both wisdom and support for the attainment of a specific purpose.

Maintenance & Performance Check-Ups: On a monthly basis, you should pause to evaluate your performance. What progress have you made? Where have you been challenged? What do you need to do differently or more of? It is also important to step back and consider whether any of your goals are unachievable.

Personal Reason Why: You won't become successful until and unless you identify, support, and empower your reasons why. Your whys provide fuel for achievement, and are the reasons behind all action and inaction. The hallmark of all high achievers is a burning why. They know what they want, how and when they will achieve it, but most importantly, they know WHY they want to become successful at achieving their goals.

Goals: The key in writing your goals is to make them measurable, specific, and time-bound. Goals need to be written for each of the ten critical areas of life to include: Personal, Health, Recreation, Family, Friends, Community, Career, Financial, Household, and Spiritual.

Reflection

1. What is your personal definition of greatness? What does greatness look like to you?

2. What is your mission in pursuing greatness? What is your purpose?

3. What do you want your life to look like 5 years from now? Create a specific and detailed vision below.

4. What advice would you like your future self to give to your current self?

Reflection

5. What is the major step you plan to take to improve your financial results?

6. What would you most like to change about yourself?

7. What are you looking forward to learning?

8. What is one as-yet undeveloped talent you are willing to explore?

Break Down Your Big Intimidating Goals Into Simple Steps

Make sure all your goals are **SMART**.

SMART Checklist:

Specific **M**easurable **A**ttainable **R**ealistic **T**imely

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

HEALTH GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

RECREATIONAL GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

FAMILY GOALS

A good exercise is to write down all the “hats you wear” and create goals around each of them. For instance. Wife, Father, Sister, etc.

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

FRIENDSHIP GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

COMMUNITY GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

CAREER GOALS**Long term Goal #1:**

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

FINANCIAL GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

HOUSEHOLD GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:

SPIRITUAL GOALS

Long term Goal #1:

Short-term Goal:

Short-term Goal:

Long term Goal #2:

Short-term Goal:

Short-term Goal:
