



CONDITIONOMICS
GOALS DRIVER™

wealth is not about the money...

Name:

Date:

CONDITIONOMICS GOALS DRIVER™

TIME TO DREAM BIG. MOVE FAST. MAKE IT REAL.

TIPS FOR COUPLES:

- Each partner completes the forms individually.
- Share and discuss your individual results.
- Agree on **shared** goals and actions, and document them together.

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GOALS WORKSHEET

STEP 1 - LIST YOUR GOALS:

Write down every goal you have, both personal (P) and professional (PR).

TIP: Use a digital device or paper. Don't worry about order or importance yet. Examples: "Start a business," "Travel to Europe," "Get a promotion," "Pay off student loans."

STEP 2 - CATEGORIZE AND RANK:

Mark each goal as "P" (personal) or "PR" (professional).

Select your top six goals in each category.

Rank these from 1 (most important) to 6 (least important).

TIP: Ranking helps you prioritize what to work on first.

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(Spouse)

	CATEGORIES	Rank	*P/ PR	GOALS
Family	<ul style="list-style-type: none"> • Spouse • Children • Parents • Grandchildren • Extended Family 			
Health	<ul style="list-style-type: none"> • Maintenance • Special Needs • Assisted Living • Long Term Care 			
Community	<ul style="list-style-type: none"> • Church • Schools • Youth Organizations • Support Centers 			
Charity	<ul style="list-style-type: none"> • Community Support • Research • Business Development • Foundation 			
Travel	<ul style="list-style-type: none"> • Members • Mode • Destinations • Frequency 			
Tangible Assets	<ul style="list-style-type: none"> • Personal Possessions • Home & Accessories • Technology Products • Autos / Collectibles 			
Professional	<ul style="list-style-type: none"> • Personal Development • Time Allocation • Start New Business • Organization Changes • The Future Business 			

***P= Personal PR = Professional**

GOALS DRIVER

FOR EACH OF YOUR TOP 6 GOALS:

STEP 1 - Specify what the goal is.

STEP 2 - Set a target date or timeframe.

STEP 3 - Write down why this goal matters to you.

STEP 4 - Write down what you are willing to do to make it happen.

STEP 5 - Set your financial objectives for each of the next three years.

TIP: Work left to right across the two pages and be as specific as possible

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	Rank	Goals	Deadline	Why do you want to achieve this?
PERSONAL	1			
	2			
	3			
	4			
	5			
	6			

PROFESSIONAL	1			
	2			
	3			
	4			
	5			
	6			

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What are you willing to do to make it happen?	Financial Objectives		
	Year 1	Year 2	Year 3

BELIEVABILITY FACTORS

STEP 1 - For personal, professional, and financial areas, list three things that make you confident (e.g., skills, savings, support network).

STEP 2 - List three things that make you uncertain or could slow you down (e.g., market volatility, lack of time, debt).

TIP: Use these lists to recognize strengths and areas needing attention.

(see examples on next page)

Believability Factors		
	Confidence (inspire-expand)	Uncertainty (fear-doubt)
Personal	1	1
	2	2
	3	3
Professional	1	1
	2	2
	3	3
Financial	1	1
	2	2
	3	3

(Examples)

Confidence Factors

Personal	Professional	Financial
Spouse	Experience	Ability to Save
Faith	Profession	Assets
Family	Industry	Lack of Debt
Attitude	Company	Lifestyle
Health	Credentials	Advisor(s)
Living Habits	Partner(s)	Income
Family Values	Boss	ER Benefits
Age	Credibility	Inheritance

Uncertainty Factors

Personal	Professional	Financial
Health	Industry	Mkt Volatility
Relationships	Boss	Inflation
Parent Needs	Funding	Taxes
Time Mgt	Not Motivated	Health Crisis
Child Needs	Office Politics	Death
Living Habits	Partner	Longevity
Priorities	Credentials	Lawsuits
Burnout	Market	Divorce

FOCUS FACTORS

STEP 1 - Choose three actions in each area (personal, professional, financial) that you will focus on over the next 12 months.

STEP 2 - Write these actions down and keep them visible. These are your top priorities.

TIP: These should be concrete steps, like “Update resume,” “Increase retirement contributions,” or “Schedule monthly budget reviews.”

Focus Factors (Progress not Perfection)			
List the three most important actions you can take in your personal, your professional and your financial lives over the next twelve months, that will enable you to achieve more goals with greater confidence and less uncertainty?			
P	1	2	3
Pr	1	2	3
F	1	2	3