

3 Steps to Achieving Your Goals

When you have a clear picture of what you want to achieve, how you achieve your dreams becomes the next most important step for you to take.

Here are our tips to help you Create, Protect and Enjoy your goals.

01

Dream

If you can't picture it, you can't reach it. Start with a wish list to help you clarify what your goals should look like.



02

Plan

Now that you have your clear vision, it's time to determine what outcomes or goals you need to ensure you turn your dreams into reality.



03

Do

Once you have your vision and plan in place, it's time to start taking action towards achieving them.



Finally, work with a financial coach to help you create the stepping stones to living the life you want to live. By having a financial coach they will act as an accountability buddy to keep you on track and help you to adjust as you transition through your different life stages.

Get started with our Goal Setting Worksheet!

Write down your goals or find pictures to record them, then look at what your next steps need to be.

strategies@jbsfinancial.com.au

Goal Setting

GOALS

Empty space for writing goals.

STEPS

Empty space for writing steps.

ACTIONS TO TAKE

Empty space for writing actions to take.

MOTIVATIONS

Empty space for writing motivations.

POTENTIAL PROBLEMS

Empty space for writing potential problems.

PROGRESS TRACKER

Large empty space for tracking progress.