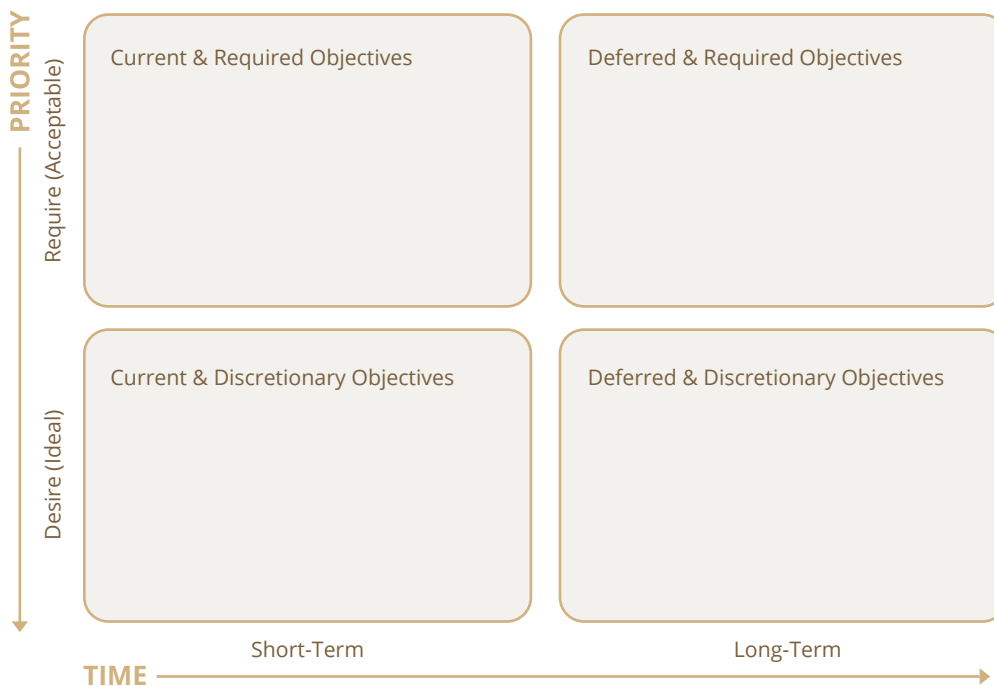


Wealth & Life Goal Discovery Chalkboard

Clarify and prioritize your goals

Articulate your crazy goals. The first step to making your goals possible is to write them down. At The Advisory Group, we use the goal discovery chalkboard to help our clients prioritize their goals that will drive their Wealth & Life plan.



INSTRUCTIONS

Using four quadrants, you can map out which goals are imminent and which ones have a longer horizon. You'll also create a band of outcomes, ranging from acceptable to ideal. Feel how liberating it is to get your ideas out of your head and onto the page.

EXAMPLE



Go beyond your goals: Try this exercise with your spouse, business partners, or kids, around both your wild and not-so-wild goals. It's best to start by filling it out separately and then compare, discuss, and agree on a joint version.



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