



# DETERMINED SOULS

setting

# PURPOSEFUL GOALS

GOAL SETTING GUIDE

part 1

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a workbook from

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# Start with WHY

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Understanding the deeper meaning to the goals we want to achieve helps us commit to them at a whole new level.

## WHAT ARE 3 GOALS THAT YOU WOULD LIKE TO ACCOMPLISH THIS YEAR?

Goal #1

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Why is that important to you?

Why?  
What would it do for you?

Why?  
What would it do for you?

Why?  
What would it do for you?

How will achieving this goal make you feel?

Goal #2

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Why is that important to you?

Why?  
What would it do for you?

Why?  
What would it do for you?

Why?  
What would it do for you?

How will achieving this goal make you feel?

Goal #3

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Why is that important to you?

Why?  
What would it do for you?

Why?  
What would it do for you?

Why?  
What would it do for you?

How will achieving this goal make you feel?

# Start with WHY

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Knowing what will happen If we do not commit to our goals helps us keep them in perspective so we will avoid that pain

## LIST THE SAME 3 GOALS FROM THE PREVIOUS PAGE

Goal #1

Goal #2

Goal #3

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What would happen if you did not meet this goal?

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What would happen if you did not meet this goal?

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What would happen if you did not meet this goal?

What else would happen?

What else would happen?

What else would happen?

Would anyone else be affected by that?

Would anyone else be affected by that?

Would anyone else be affected by that?

How would that make you feel?

How would that make you feel?

How would that make you feel?

How will not achieving this goal make you feel?

How will not achieving this goal make you feel?

How will not achieving this goal make you feel?

# Start with WHY

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Note any key take-aways from your discovery of the meaning behind your goals and how your life will be impacted by your commitment to them.

# Determining Your Personal Expenses

*Use this page as a brainstorming guide to identify your personal expenses*

Mortgage / Rent	
Property Tax & Homeowner Ins (if not included in house payment)	
HOA	
Water / Sewer	
Cable / Internet	
Utilities / Home Security System	
Landscaping / Pool Service	
House Cleaning	
Home Warranty	
Pet Services: Boarding / Groomer / Food / Medical	
Auto Payment / Lease (for all vehicles)	
Auto Insurance	
Fuel / Auto Maintenance	
Health / Dental / Vision Insurance	
Life Insurance	
Monthly Prescription Costs	
Non-Covered Medical Costs	
Hair / Nails	
Clothing	
School Supplies	
Extracurricular Sports / Uniform / Travel	
Gym Membership(s)	
Groceries / Household Supplies	
Entertainment (books, movies, theater, etc)	
Restaurants	
Subscriptions (Amazon, Netflix, Audible, Spotify, Magazine, Apps, etc)	
Gifts	
Tithe / Non-profit Contributions	
Child Cre	
Alimony / Child Support	
Alcohol	
Misc.	
Misc.	

# Calculating Your Personal Expenses

Type	Amount Per Year
House / Rent Payment	
Food - Including restaurants and groceries	
Utilities / TV / Internet / Subscriptions	
Monthly Payments - Student Loans / Credit Cards	
Pet Care Expenses	
Child Care Expenses / Tuition	
Auto - Monthly Payment / Insurance / Fuel / Maintenance	
Health & Life Insurance / Medical Bills	
Entertainment / Lifestyle / Hobbies / Clothing / Misc	
Other / Misc	
Total	\$
Add taxes for above Total amount based on your tax bracket	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Personal Expenses	

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# Calculating Your Business Expenses

Type	Amount Per Year
Business / Franchise Fee	
Salaries / Benefits / Professional Services	
Lead Generation / Marketing	
Occupancy / Office Rent	
Education / Coaching	
Communication / Technology	
Automobile	
Equipment / Furnishings	
Office Supplies	
Insurance	
Other	
Total	\$
Add taxes for above Total amount based on your tax bracket	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Business Expenses	

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# Calculating Your Envisioned Life Goals

Type (examples)	Amount Per Year
Vacation Fund	
Down Payment for a Home Purchase	
Home Improvements	
College Fund	
Additional Debt Payoff (student loans, credit cards)	
Down Payment for an Investment Property	
New Vehicle	
Total	\$
Add taxes for above Total amount based on your tax bracket	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Envisioned Life Goals	

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# Set Your Production Goal

Personal Budget	Amount Per Year
Total	\$
Add taxes for above Total amount based on your tax bracket **	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Personal Expenses	

*\*\*to calculate taxes: Total Expenses x Tax Bracket%*

Business Expenses	Amount Per Year
Total	\$
Add taxes for above Total amount based on your tax bracket	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Business Expenses	

*\*\*to calculate taxes: Total Expenses x Tax Bracket%*

Your Envisioned Life Goals	Amount Per Year
Total	\$
Add taxes for above Total amount based on your tax bracket	\$
Grand Total	\$
Grand Total ÷ by Avg Commission/Revenue = _____ units needed to close/sell to fund Life by Design Goals	

*\*\*to calculate taxes: Total Expenses x Tax Bracket%*

Number of units needed to fund Personal Expenses	
Number of units needed to fund Business Expenses	
Number of units needed to fund a Life by Design	

Grand Total Number of Units Needed to Sell = \_\_\_\_\_

# Map to Achieve Your Big Goals

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My BIG Goal for the Year is... \_\_\_\_\_

Priority #1 to Achieve my BIG Goal for the year... \_\_\_\_\_

Strategy #1 to Achieve Priority #1: \_\_\_\_\_

Strategy #2 to Achieve Priority #1: \_\_\_\_\_

Strategy #3 to Achieve Priority #1: \_\_\_\_\_

Strategy #4 to Achieve Priority #1: \_\_\_\_\_

Strategy #5 to Achieve Priority #1: \_\_\_\_\_

Priority #2 to Achieve my BIG Goal for the year... \_\_\_\_\_

Strategy #1 to Achieve Priority #2: \_\_\_\_\_

Strategy #2 to Achieve Priority #2: \_\_\_\_\_

Strategy #3 to Achieve Priority #2: \_\_\_\_\_

Strategy #4 to Achieve Priority #2: \_\_\_\_\_

Strategy #5 to Achieve Priority #2: \_\_\_\_\_

Priority #3 to Achieve my BIG Goal for the year... \_\_\_\_\_

Strategy #1 to Achieve Priority #3: \_\_\_\_\_

Strategy #2 to Achieve Priority #3: \_\_\_\_\_

Strategy #3 to Achieve Priority #3: \_\_\_\_\_

Strategy #4 to Achieve Priority #3: \_\_\_\_\_

Strategy #5 to Achieve Priority #3: \_\_\_\_\_

# Map to Achieve Your Big Goals

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## Annual Goals

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

## Monthly Goals

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

## Weekly Goals

Week 1

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 2

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 3

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 4

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

# Goal Setting

at a glance

January

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February

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March

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April

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May

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June

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July

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August

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September

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October

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November

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December

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