2. FUTURE PLANNING WORKSHEET

Decide where you're going.

A plan today
creates choice tomorrow.

Planning turns your goals into a clear direction and your dreams into achievable steps.
Use this worksheet to clarify your goals, set priorities and build a roadmap for the future you want.

1. YOUR VISION

What does a good life look like for you?
Take a few moments to imagine your ideal future.

In the future, I want to...

_____

_____

_____

_____

- What truly matters to you?
- What kind of lifestyle do you want?
- What do you want your future to feel like?

2. YOUR GOALS

Write down your most important goals.
Be specific about what you want to achieve.

GOAL	WHY IT MATTERS	TARGET DATE
1.		
2.		
3.		
4.		
5.		

Which goal will make the biggest positive difference to your life?

_____

3. PRIORITIES

Not everything can be a priority.
Focus on what will move you forward most.

1 PRIORITY: _____
WHY THIS MATTERS: _____

2 PRIORITY: _____
WHY THIS MATTERS: _____

3 PRIORITY: _____
WHY THIS MATTERS: _____

4. KEY LIFE AREAS CHECK

Rate how well you feel you are doing in each area.
1 = Needs Attention 5 = Strong

LIFE AREA	1	2	3	4	5
Financial Wellbeing	○	○	○	○	○
Health & Energy	○	○	○	○	○
Relationships	○	○	○	○	○
Personal Growth	○	○	○	○	○
Work / Purpose	○	○	○	○	○
Home & Environment	○	○	○	○	○
Fun & Enjoyment	○	○	○	○	○
Contribution / Legacy	○	○	○	○	○

Which area will you focus on improving first? _____

5. POTENTIAL ROADBLOCKS

What might get in the way of your plans?
How can you prepare for them?

POTENTIAL ROADBLOCK	HOW I WILL MANAGE IT
1.	
2.	
3.	

6. YOUR NEXT STEPS

Small steps taken consistently create real progress.
List the first three actions you will take.

ACTION	WHEN	DONE
1.		☐
2.		☐
3.		☐

7. REVIEW DATE

Set a date to review your plan and stay on track.

I will review this plan on: ____/____/____

A plan is not set in stone.
Review regularly.
Adapt as life changes.
Stay focused on what matters most.

This is one of the Five Pillars of The Market Man Method™.
Use it alongside the other pillars to build a stronger financial future.

More free tools and resources are available to help you take action and build a better future.

Visit: themarketmanmethod.co.uk