



MYGOALS FOR A RETIREMENT LIFE BY DESIGN

In my many years as a professional financial wealth advisor, I have very seldom seen an example of someone really knowing their Retirement Life By Design- let alone a retirement lifestyle of their choosing- and having a written goals plan to support them in getting there. We all have dreams and the desire to seek the things we believe will bring joy and fulfillment. Studies have shown that the happiest people prioritize time over money. I believe it is more important that you actually know how to achieve the goals you have for yourself and for what reasons you want to accomplish them.

This is why I designed the MYGOALS Planner- with you and your goals in mind. I've been searching for years for the right tools and the best technique for staying on track and being organized while achieving goals. I've compiled those years of research and designed a tool to make achieving your goals attainable. More importantly, I've designed a tool that will keep you on course for the true destination and inspiration for your life goals.

Ask yourself when was the last time you evaluated your life goals? Have they changed recently? Have you since adjusted your financial goals to match? Where do you want to see yourself in 1, 10 and 20 years?

It's essential to consider your goals, passions and purpose in context- the span of a lifetime. Remembering things that may have mattered to you a few or many years ago, but that no longer hold value. Utilizing the MYGOALS planner in this way can help you implement a vision specific to your Retirement Life By Design.

The word "retirement" has a tendency to conjure up ideas of someone at the end of their viable life taking time to "do nothing". This widely accepted definition must be rejected. It's time to reframe your retirement and include it in your life plans beyond setting aside some money and assigning it to be "dealt with" or "faced" when the time arrives. It's time to create goals that are truly rich and meaningful to you.

Is MYGOALS for Retirement Life By Design right for you? Ask yourself these questions:

1. Do I know what my purpose is in life? Am I living my life in a way that reflects that and the things I'm passionate about? If I am not, when am I planning on starting?
2. Do I have a detailed vision of my Retirement Life By Design? Have I shared this vision with my spouse or partner? Do I know what their Retirement Life By Design looks like?
3. Do I have an action plan for my arriving at my Retirement Life By Design? Are my short-term goals, decisions and actual use of resources like time and money coherent and supportive of my long-term goals? Can I list the specific things I have accomplished in the past six months on my long-term goals?

If you are unsatisfied with your responses to any of these questions or want to take a more active role in securing your long-term goals, then MYGOALS Planner is for you.

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