

THE
FUTURE
YOU

OCEAN6
GOAL PLANNER

INTRODUCTION

UNDERSTANDING YOUR GOALS IS SO IMPORTANT WHEN IT COMES TO FINANCIAL PLANNING BECAUSE IF YOU DON'T KNOW WHERE YOU'RE GOING, YOU'RE NEVER GOING TO GET THERE.

THE FUTURE YOU AWAITS

This visualization and goal-setting session will help you get clear on what you want to accomplish in your life. The goals you set now will guide you when making financial decisions.

You will find everything you need to get started with financial goal setting in this workbook.

Once you're clear on the life you want to live, we'll create a plan to get you there.

“WITHOUT DREAMS AND GOALS, THERE IS NO LIVING, ONLY MERELY EXISTING, AND THAT IS NOT WHY WE ARE HERE.

— MARK TWAIN

VISUALIZE

VISUALIZE THE BEST VERSION OF YOURSELF.

Visualization is a skill that has helped a lot of influential people like Oprah, Bill Gates, and Jim Carrey. It requires you to want something, perceive it, and believe in it.

Once you are working toward your goal, the process, and energy you put into visualization will begin to shift your life in a positive direction over time.

INSTRUCTIONS

- 1 Get comfortable. Close your eyes and enjoy the 20-minute visualization led by Meditation Expert, Nicole Collet.
- 2 When the visualization is complete, turn to the next page and jot down the goals as they come to you.
- 3 Categorize your goals into personal, professional, or health. Get clear on the timeline and money needed.
- 4 Make these goals tangible by outlining your 5 top priority goals.
- 5 Finally, book a call with an Ocean 6 Financial Advisor to review your goals and start building the future you want to live: www.ocean6.ca/call

VISUALIZE

VISUALIZE THE BEST VERSION OF YOURSELF.

PHYSICALLY - FINANCIALLY - SPIRITUALLY - MENTALLY
SKILLS - RELATIONSHIPS - REPUTATION - HEALTH - PHILANTHROPY



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GOAL PLANNER

START SETTING AMBITIOUS **PERSONAL** GOALS.

1 - 3 YEARS	MONEY NEEDED
5 - 10 YEARS	MONEY NEEDED
LIFE	MONEY NEEDED

GOAL PLANNER

START SETTING AMBITIOUS **PROFESSIONAL** GOALS.

1 - 3 YEARS	MONEY NEEDED
5 - 10 YEARS	MONEY NEEDED
LIFE	MONEY NEEDED

GOAL PLANNER

START SETTING AMBITIOUS **HEALTH** GOALS.

1 - 3 YEARS	MONEY NEEDED
5 - 10 YEARS	MONEY NEEDED
LIFE	MONEY NEEDED

PRIORITY GOALS

01

What's your goal?

Money needed: _____ In how many years: _____

02

What's your goal?

Money needed: _____ In how many years: _____

03

What's your goal?

Money needed: _____ In how many years: _____

04

What's your goal?

Money needed: _____ In how many years: _____

05

What's your goal?

Money needed: _____ In how many years: _____



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