

## The Essential Planning Approach

The Essential Planning Approach is a quarterly meeting with you and your significant other to help you remain focused, identify the essentials and achieve your goals. Use the rule of three - every three months, take three hours to discuss these three topics: career goals, financial goals, and life goals.

For best results, have the meeting take place away from your home in a quiet location with few distractions. Lastly, always complete the included meeting agenda before you start the session.

### **Sample Agenda**

If applicable, review the goals and progress of the last meeting

#### Career Goals and Objectives:

- Make a career change
- Advance to “XYZ” position in 2 years
- Find a mentor
- Become a mentor
- Develop a succession plan

#### Financial Goals and Objectives:

- Create a budget
- Pay off the house in 5 years
- Be debt free in 18 months
- Have “X” amount in retirement funds by 55
- Retire in “X” years
- Discuss family investment legacies
- Fund a grandchild’s higher education

#### Life Goals and Objectives:

- Start a family
- Volunteer for a charity
- Purchase a vacation home
- Take a vacation
- Bucket-list items/new hobby

#### Conclusion:

- Set the next meeting’s date
- Set a due date for the next meeting’s agenda

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Home of the Essential F<sup>o</sup>RMula™

Date:

If applicable, review the goals and progress of the last meeting

Career Goals and Objectives:

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Financial Goals and Objectives:

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Life Goals and Objectives:

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Conclusion:

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