



See It. Believe It. Build It.

Your vision is the blueprint for your future.
Get clear on what financial freedom looks like for you
and create a plan to make it your reality.



DATE: _____



YOUR NAME: _____



WHY THIS MATTERS TO ME: _____

1 MY FINANCIAL VISION

Close your eyes and imagine your best financial life.
What does it look like? How does it feel? Be specific.



I SEE A FUTURE
WHERE...

VISION STATEMENT

In one powerful
statement,
I envision...

“



2 WHAT FINANCIAL FREEDOM LOOKS LIKE FOR ME

Define what financial freedom looks like in each area of your life.



FAMILY & LOVED ONES

How do I want to
provide, support, and
impact my family?

- _____
- _____
- _____



HOME & LIFESTYLE

What kind of home
and lifestyle do I
desire?

- _____
- _____
- _____



GROWTH & PURPOSE

What personal growth,
education, or purpose
do I want to pursue?

- _____
- _____
- _____



CAREER & INCOME

What kind of work
do I want to do and
income do I desire?

- _____
- _____
- _____



WEALTH & LEGACY

What legacy do I want
to leave for future
generations?

- _____
- _____
- _____



EXPERIENCES & FUN

What experiences
and adventures do I
want to enjoy?

- _____
- _____
- _____

3 MY TOP FINANCIAL GOALS

List your top 5 financial goals.

- 1
- _____
- 2
- _____
- 3
- _____
- 4
- _____
- 5
- _____

4 TARGET TIMELINE

When do I want to achieve each goal?

- _____ / _____ / _____
- _____ / _____ / _____
- _____ / _____ / _____
- _____ / _____ / _____
- _____ / _____ / _____

5 WHY THESE GOALS MATTER

What impact will achieving these goals
have on my life and the lives of others?



6 MY COMMITMENT

I commit to taking consistent action toward my vision
every single day.



I WILL START BY: _____

I WILL STAY COMMITTED BY: _____

I WILL CELEBRATE WINS BY: _____



DISCIPLINE TODAY. FREEDOM TOMORROW.

7 DAILY FOCUS REMINDER

I will remember my vision daily and take action.

“

WHERE FOCUS GOES,
ENERGY FLOWS.
WHERE ENERGY FLOWS,
WEALTH GROWS.



DAILY I WILL...

- ☐ Stay focused on my goals
- ☐ Manage my money wisely
- ☐ Invest in my growth
- ☐ Help others when I can
- ☐ Trust God and stay faithful



I AM BUILDING MY FUTURE
WITH INTENTION, FAITH,
AND FINANCIAL WISDOM.

AFFIRMATION

*I am capable. I am consistent.
I am becoming everything I envisioned.*



MY VISION IS CLEAR.
MY PLAN IS SOLID.
MY FUTURE IS BRIGHT.





Small Steps Today. Big Freedom Tomorrow.

Great financial change starts with focus and daily action.
Use this planner to set powerful 30-day and 90-day goals
that move you closer to your financial vision.



DATE STARTED: _____



YOUR NAME: _____



MY WHY: _____



30 DAY GOALS

Build Momentum. Create Habits. See Progress.

MY FOCUS AREAS (Choose up to 3)



SAVE



PAY DOWN
DEBT



INCREASE
INCOME

OTHER: _____

MY 30 DAY GOALS

What I will accomplish in the next 30 days.

- 1
- 2
- 3

30 DAY ACTION PLAN

Break it down. Take consistent daily action.

ACTION STEP	WHY IT MATTERS	TARGET DATE	DONE
1		___ / ___ / ___	☐
2		___ / ___ / ___	☐
3		___ / ___ / ___	☐
4		___ / ___ / ___	☐
5		___ / ___ / ___	☐
6		___ / ___ / ___	☐
7		___ / ___ / ___	☐
8		___ / ___ / ___	☐
9		___ / ___ / ___	☐
10		___ / ___ / ___	☐



30 DAY SUCCESS CHECK-IN

How will I know I succeeded?

- ☐ I stayed consistent
- ☐ I took action daily
- ☐ I stayed within my budget
- ☐ I made progress toward my goals
- ☐ I celebrated small wins

WHAT I LEARNED:

WHAT I WILL IMPROVE:



90 DAY GOALS

Build Systems. Create Results. Change Your Life.

MY FOCUS AREAS (Choose up to 3)



SAVE



PAY DOWN
DEBT



INCREASE
INCOME

OTHER: _____

MY 90 DAY GOALS

Where I will be 90 days from now.

- 1
- 2
- 3

90 DAY ACTION PLAN

Plan it out. Stay committed.

ACTION STEP	WHY IT MATTERS	TARGET DATE	DONE
1		___ / ___ / ___	☐
2		___ / ___ / ___	☐
3		___ / ___ / ___	☐
4		___ / ___ / ___	☐
5		___ / ___ / ___	☐
6		___ / ___ / ___	☐
7		___ / ___ / ___	☐
8		___ / ___ / ___	☐
9		___ / ___ / ___	☐
10		___ / ___ / ___	☐



90 DAY SUCCESS CHECK-IN

How will I know I succeeded?

- ☐ I stayed consistent
- ☐ I followed my plan
- ☐ I saw financial progress
- ☐ I built better habits
- ☐ I moved closer to freedom

WHAT I ACCOMPLISHED:

WHAT'S NEXT:



30 DAY COMMITMENT

I am committed to taking action
every single day for the next 30 days.

SIGNATURE: _____ DATE: ___ / ___ / ___

“ DISCIPLINE TODAY.
FREEDOM TOMORROW.



90 DAY VISION

I am committed to the next 90 days
of focused action and major results.

SIGNATURE: _____ DATE: ___ / ___ / ___



DAILY AFFIRMATION

I am capable. I am consistent. I am building wealth.
My future is in my hands, and I choose freedom.

REMEMBER:

- Start where you are.
- Use what you have.
- Do what you can.
- God will handle the rest.



*Plan Today. Prosper This Year. Build Your Legacy.*

This is your 12-month roadmap to financial freedom.
Set clear goals, take intentional action,
and celebrate progress every step of the way.



DATE STARTED: _____



YOUR NAME: _____



MY WHY: _____

1 MY FINANCIAL VISION

Describe your ideal financial life one year from today.
What will be different? How will it feel?

IN ONE YEAR, I WILL HAVE...

- ☐ More financial freedom and less stress
- ☐ Financial stability and strong savings
- ☐ Debt reduced or eliminated
- ☐ Increased income
- ☐ Progress toward big goals
- ☐ Peace of mind
- ☐ A legacy I'm proud to leave
- ☐ Other: _____



2 MY ONE YEAR GOALS OVERVIEW

Big Goals. Bold Steps. Bright Future.

SAVE

How much?

1. _____
2. _____
3. _____



PAY DOWN DEBT

Which debts?

1. _____
2. _____
3. _____



INCREASE INCOME

How will I do this?

1. _____
2. _____
3. _____



HOME & LIFESTYLE

What do I want?

1. _____
2. _____
3. _____



GROWTH & PURPOSE

What will I pursue?

1. _____
2. _____
3. _____



WEALTH & LEGACY

What legacy do I want to create?

1. _____
2. _____
3. _____

3 MY 12-MONTH GOALS AT A GLANCE

Break your year into intentional steps.

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____	Focus: _____
Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____	Goal: _____
☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done	☐ Done

4 MY ONE YEAR ACTION PLAN

Turn goals into action. Take consistent steps every month.

GOAL AREA	ACTION STEPS	WHY THIS MATTERS	START DATE	TARGET DATE	RESOURCES / SUPPORT	DONE
SAVE			___/___/___	___/___/___		☐
PAY DOWN DEBT			___/___/___	___/___/___		☐
INCREASE INCOME			___/___/___	___/___/___		☐
HOME & LIFESTYLE			___/___/___	___/___/___		☐
GROWTH & PURPOSE			___/___/___	___/___/___		☐
WEALTH & LEGACY			___/___/___	___/___/___		☐

5 QUARTERLY REVIEW CHECK-IN

Reflect. Adjust. Keep Moving Forward.

Q1 (JAN-MAR)

Wins: _____

Challenges: _____

What I'll Adjust: _____

Q2 (APR-JUN)

Wins: _____

Challenges: _____

What I'll Adjust: _____

Q3 (JUL-SEP)

Wins: _____

Challenges: _____

What I'll Adjust: _____

Q4 (OCT-DEC)

Wins: _____

Challenges: _____

What I'll Adjust: _____

6 ONE YEAR CELEBRATION

I did it!

When I reach my one year goals,
I will celebrate by:



MY COMMITMENT

I commit to showing up,
taking action, and staying faithful
to my financial goals this year.



I CHOOSE DISCIPLINE TODAY
FOR FREEDOM TOMORROW.

My future is in my hands.

REMEMBER

- ✓ Small steps daily create big results.
- ✓ Stay focused. Stay consistent.
- ✓ God's plan + my plan = success.





Plan Beyond Today. Build the Life You Envision.

Longer term goals create lasting change and generational impact.
Use this planner to dream big, plan smart,
and take consistent action toward your legacy.



DATE STARTED: _____



YOUR NAME: _____



MY WHY (My bigger purpose): _____

1 MY LONGER TERM VISION

Where do I see myself and my family in 5, 10, 15, 20+ years?

KEY LIFE MILESTONES I WANT TO ACHIEVE:

- ☐ Financial Freedom
- ☐ Debt-Free Lifestyle
- ☐ Homeownership / Real Estate
- ☐ Business Ownership
- ☐ Retirement Comfortably
- ☐ Generational Wealth
- ☐ Travel the World
- ☐ Give Generously
- ☐ Leave a Legacy
- ☐ Other: _____

I am building today
for the life I
want tomorrow
and the legacy I
leave behind.

2 MY GOALS BY TIME HORIZON

TIME HORIZON	FINANCIAL GOALS What do I want to accomplish?	WHY IT MATTERS How will this impact my life and my family?	ESTIMATED COST / AMOUNT NEEDED	TARGET DATE	TOP ACTION STEPS What actions will get me there?
5 YEARS Short-Term (1-5 years)	1. _____ 2. _____ 3. _____	_____ _____ _____	\$ _____ \$ _____ \$ _____	____/____/____ ____/____/____ ____/____/____	1. _____ 2. _____ 3. _____
10 YEARS Mid-Term (6-10 years)	1. _____ 2. _____ 3. _____	_____ _____ _____	\$ _____ \$ _____ \$ _____	____/____/____ ____/____/____ ____/____/____	1. _____ 2. _____ 3. _____
15 YEARS Long-Term (11-15 years)	1. _____ 2. _____ 3. _____	_____ _____ _____	\$ _____ \$ _____ \$ _____	____/____/____ ____/____/____ ____/____/____	1. _____ 2. _____ 3. _____
20+ YEARS Legacy Goals (16+ years)	1. _____ 2. _____ 3. _____	_____ _____ _____	\$ _____ \$ _____ \$ _____	____/____/____ ____/____/____ ____/____/____	1. _____ 2. _____ 3. _____

3 RESOURCES & SUPPORT

What resources, skills, or support will I need to reach my longer term goals?

- FINANCIAL RESOURCES: _____
- SKILLS I NEED TO GROW: _____
- PEOPLE / MENTORS: _____
- TOOLS / EDUCATION: _____
- OTHER SUPPORT: _____

4 POTENTIAL CHALLENGES & SOLUTIONS

POTENTIAL CHALLENGES

MY SOLUTIONS / GAME PLAN

5 PROGRESS TRACKER

Review your progress at least once a year.

REVIEW DATE	GOALS I'M MAKING PROGRESS ON	WHAT'S WORKING WELL	ADJUSTMENTS / NEXT STEPS
____/____/____			
____/____/____			
____/____/____			
____/____/____			

6 MY LEGACY STATEMENT

What legacy do I want to leave for my family and future generations?

My today builds my legacy.



MY COMMITMENT

I commit to being faithful with what
I have today so I can walk in the life
I was created to live tomorrow.

I WILL...

- ☐ Stay focused on my vision
- ☐ Take consistent action
- ☐ Manage my money wisely
- ☐ Invest in my growth
- ☐ Trust God's timing
- ☐ Leave a legacy of impact



I AM BUILDING STABILITY.
I AM CREATING OWNERSHIP.
I AM LEAVING A LEGACY.

