The background of the cover is a scenic landscape. At the top, there are stylized, layered mountain peaks in shades of blue and white, appearing as if they are cut out of a light blue background. Below this, a clear blue sky transitions into a range of real mountains. In the foreground, a calm lake reflects the sky and the surrounding landscape. On the left side of the lake, there is a small, rustic stone hut with a dark doorway. In the distance, several hikers are walking along a path on the right side of the lake. The overall mood is peaceful and inspiring.

Design the Life You Want to Live Through Personal Goal Setting

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Introduction

The purpose of this book is to help you create a life vision and mission and goals. This can be especially helpful for couples to develop together so that they can understand and integrate their values, define their roles within the relationship, to set goals, create action plans, and allocate resources to achieve their vision and mission.

Imagine you and your spouse are gagged, blindfolded, with ear plugs and you are trying to row a boat. Your spouse pulls one way, you pull another, you are disoriented and you don't know what direction you are going in, let alone what direction you are trying to go in. Would this be frustrating? Do you think you might get angry with your spouse? Would you get where you were trying to go?

This how a lot of couples live their lives. Directionless and pulling in opposite directions.

I believe my husband and I row in the same direction a great deal more than most couples do and I believe that the planning process we engage in twice a year is the main reason for our alignment. We get off course and out of rhythm from time to time, but we sense it and correct the course. Our alignment contributes to our happiness, ability to live well, the fun we have, our ability to create security for ourselves, and our ability to contribute to the world.

I believe that the process of creating a vision, mission, roles, and goals can create a more harmonious and stable marriage (or domestic partnership) for any couple because they have set a life path together and have discussed and agreed to the allocation of resources (money, time, love, energy, support, influence, etc.) Allocation of resources, task assignment, and role definition are the main causes of conflict in a marriage.

Because these discussions have taken place, there are less surprises and less decisions to make on a day to day basis. These discussions also create a more open and honest marriage with the two partners aligned.

This is an ongoing process that requires consistency and commitment of time. I recommend that couples spend at least 8-16 hours twice per year in reviewing past vision, mission, roles, goals, and action plans and creating new ones or modifying existing ones.

It's a small investment to make in such an important relationship. The reason for two times a year is that the world and your circumstances continually change so that you are able to make adjustments at mid-year.

Out of this naturally grows small session in between these formal planning sessions as circumstances change in your life.

Creating a Vision for Your Life

Time is precious . . .

Are you doing what you want to do with your life?



Creating a Vision

You can choose your path in life or you can let a path choose you. If you never think about where you want to go in life and what you want to do, then random events and other people will choose your path for you. If you want to take control of your life, a great place to start is to create a life vision.

A vision is a mental picture of what your life will look like in the future. The more specific the picture, the more powerful the effect it will have on you.

Having a Life Vision fosters focus, drive, commitment, willpower, confidence, and success.

Viktor Frankl wrote, in his book Man's Search for Meaning that "Life holds the potential for meaning under any circumstances." He was talking about a very extreme circumstance in his book: internment in the Nazi Concentration Camps.

Viktor Frankl was a Jewish Psychiatrist when he entered the concentration camp.

He had a vision to share what he learned in the concentration camp with others. He had a very specific visual picture of that vision to stand in front of a classroom and present his findings from his study of the people around him in the camp. This vision helped him survive.

What Viktor Frankl found when he studied his fellow inmates was that those who held onto a future vision were more likely to survive. Everyone's vision was different, it was just important that they have one. One person held onto the possibility of seeing a loved one again, another a vision of practicing their religion openly again. Some dreamed of spending time in nature, being able to use a talent, or passing on memories to future generations.

Studies show that those that have a vision of their future are healthier and happier. It may be because they make healthier choices because they have hope.

To help you create your life vision, answer the following are some questions. You might try closing your eyes and picturing yourself as happy, healthy, and successful. When you have a clear picture of your future, open your eyes and answer the questions below.

2. If there were no resource issues in your life (money, time, etc.), what would you do with your time?
3. What would you do if there were no possibility of failure?
4. If you only had five years to live, how would you spend that time?
5. Would your answer be different if you had 30 years left?

Other Visioning Activities:

- **Draw a picture of:**
 - Your dream life – 5 years, 20 years from now
 - Your dream career
 - Your dream partner
 - Your dream persona
 - Your dream home environment
- **Tell the story of your future.**
- **Create a Dream Board of pictures, phrases, and symbols that represent the future you would like to create.**

95 Year Old Exercise

If you were 95 years old, were drawing your last breath and you were given a beautiful gift, to go back in time and help this person have a better life.

What advice would you give this person (you) to be more successful personally and professionally?

Then write a list of what counts and what doesn't count.

What Counts	What Doesn't Count

The elderly people who were interviewed said:

- Be happy now. Don't put it off until later.
- Don't get wrapped up in what you don't have. Focus on what you do have.
- What is important is family and friends.
- Have a dream and go for it.

Identifying Your Values in Action

What we value drives our actions and decisions. Having clarity about our values can help us select how we spend our time in a way that:

- Moves us toward our vision
- Helps us be true to ourselves
- Helps us live an authentic life

In Authentic Happiness, Martin Seligman identifies twenty-four signature strengths or Values in Action that fall into six categories. His list is below:

❖ **Wisdom and Knowledge:**

- Curiosity
- Love of learning
- Judgment
- Ingenuity
- Social intelligence
- Perspective

❖ **Courage:**

- Valor
- Perseverance
- Integrity

❖ **Humanity and love:**

- Kindness and loving

❖ **Justice:**

- Citizenship
- Fairness
- Leadership

❖ **Temperance:**

- Self-control
- Prudence
- Humility

❖ **Transcendence:**

- Appreciation of beauty
- Gratitude
- Hope
- Spirituality
- Forgiveness
- Humor
- Zest

VIA Signature Strengths Inventory - Online

In order to determine your Top Five Values in Action, you can either look through the list and choose your top five or take the VIA Strengths Inventory takes online. It takes about 30-40 minutes to complete.

The web link to take the test online is:

<http://www.authentic happiness.org/Registration2.html>

You will need to register to take the inventory. There is no cost. Once you register, click on show questionnaire under VIA Strengths Inventory. It should be the first item on the list.

Once you complete the survey, your scores will appear. Select all 24 and print out the results.

If you need to get out of the inventory and get back into it, your answers to that point will be saved and here is the link:

<http://www.authentic happiness.com>

Examining Your Values

Once you have taken the Values in Action Inventory and noted your top five values or selected your top five values from the list, you can create values statements that will help you live in alignment with your values.

VIA Strengths Example:

- Capacity to love and be loved
- Social Intelligence
- Love of Learning
- Creativity, ingenuity, and originality
- Caution, prudence, and discretion

Example of Values Statements

VIA Strengths (Values in Action)	
Capacity to love and be loved	Listen to and truly hear others. Support others' feelings. Give to others without expecting reciprocity.
Social Intelligence	Act in a way that brings out the best in others.
Love of Learning	Read, write, research, and investigate things I'm interested in.
Creativity, ingenuity, and originality	Create workshops and write articles and books.
Caution, prudence, and discretion	Take care of my health.
Low scoring value: Bravery	Don't let fear stop me.

Creating Your Life Mission

Mission is an inner urge to pursue an activity or perform a service. It is a calling. It is what you intend to do or achieve. It is what we desire. It is what we want to be.

Your mission statement can be a list of values, like Benjamin Franklin's or it can be a paragraph, a series of sentences, a story, a symbol or a few short words. It is up to your creativity.

Benjamin Franklin's Life Mission

Temperance, Silence , Order, Resolution, Frugality, Industry,
Sincerity, Justice, Moderation, Tranquility, Chastity

Life Mission Example

Live an extraordinary life filled with love, meaning, fun, and adventure.

What is Personal Goal Setting?

Personal goal setting is important because it helps us move toward getting what we want out of life. Without goals, we move aimlessly and often let circumstances, events, and other people make our choices for us.

We only have so much time, energy, resources, and love to give. If we do not have a direction, these resources become fragmented and diluted. Time goes by, but we don't get what we want.

We find ourselves in the same mundane job, in the same mediocre relationship, living in the same uninspiring place, and doing the same lackluster activities. Or even worse, we find ourselves bounced from task to task with no purpose or direction.

As a Mid-Life Renewal Coach, I help my clients continuously make goals and action plans to move toward getting what they want in life. The plans they make help them spend their time, energy, and love in ways that create joy and meaning. They also create accountability for themselves so that they continue to follow the path toward their dreams, even when events, circumstances, and people try to pull them off the path.

Let's work together today to create some career and business goals and some life style and life structure goals that will start you on your way toward getting what you want.

Gratification/Purpose/Meaning
Pleasure/Leisure/Joy
Vacation
Passing on Your Personal Legacy

Career/Business

- Get a new job
- Get promoted
- Find a new career path
- Start a new business
- Grow my business

Financial

- Save money
- Increase financial security
- Prepare for retirement

Relationships

- Find a romantic partner (this goal is not for couples)
- Improve our marriage
- Get closer to our kids
- Spend quality time together

Traditions

- Build strong holiday traditions
- Build our own holiday traditions
- Build traditions that bind our family together

Lifestyle

- Work less
- Live closer to work

Home

- Buy a home
- Upgrade our home
- Maintain our home

Health

- Maintain health
- Improve health
- Deal with health problems

Safety/Risk Management

- Increase safety
- Decrease health, monetary, safety risk

Personal Growth/Education

- Get a degree
- Get more education
- Be a better person

Spiritual Growth

- Define what spirituality is for me

- Get closer to God
- Pass on my beliefs to others
- Explore new ways to be spiritual
- **Gratification/Purpose/Meaning**
- Find more meaningful work
- Engage in a meaningful hobby or volunteer work
- **Pleasure/Leisure/Joy**
- Have more pleasure our lives
- Have more leisure time in our lives
- Enjoy our leisure time more
- Have more joy in our lives
- **Vacation**
- Have a nice vacation for not a lot of money
- Travel to exotic places
- Have a relaxing vacation
- **Passing on Your Personal Legacy**
- Pass on my skills others
- Pass on my knowledge to others
- Pass on my history
- Pass on my family's history
- Pass on a way of life

Career/Business Goals

Ideal Career/Business Characteristics - Example

1995

1. Work that makes me happy
2. Work with the following characteristics:
 - Meaningful work
 - Creativity
 - Respect
 - Nurturing
 - Security

2002

1. Work with the following characteristics
 - Peaceful
 - Creativity
 - Flexible
 - Respect
 - Meaningful work
 - Independent
2. Not too much day to day pressure to meet deadlines
3. Work with people one on one in a positive way
4. An opportunity to build people
5. Work 30 hours a week
6. Not to have to deal with de-motivated people

Career/Business Characteristics

Choose five characteristics that you would like your work to have at this time (your desired characteristics may change throughout your life, as mine have). You can use your five characteristics to assess possible career choices or to modify your current work to be more satisfying and compatible with your desired lifestyle.

_____ **Independence:** Doing things on your own; having the freedom to do as you believe is best, ability to take risks at work.

_____ **Fun:** Being happy, enjoying the type of work, and being in a pleasant environment.

_____ **Expertise:** Being the best in your field, having an opportunity for competition, receiving recognition, meeting goals.

_____ **Ability To Exercise Competency:** Showing a high degree of proficiency in job skills and knowledge.

_____ **Wealth:** Earning a great deal of money, salary /commission, bonuses.

_____ **Education:** Continuing to learn new things, expanding your knowledge in a new area.

_____ **Location:** Living close to work, working where there are interesting things to see or do.

_____ **Leadership:** Ability to influence others, ability to inspire others to action.

_____ **Creativity:** Developing and/or implementing new ideas or projects.

_____ **Prestige:** Position or accomplishment provides prestige and/or respect from others.

_____ **Nurturing:** Contributing to the welfare of others, helping people or society.

_____ **Friendship:** Being liked by others, having companionship, working on team projects with persons you would choose to work with.

_____ **Flexibility:** Flex time, ability to take off at different times during the day or week, ability to work less than 40 hours a week.

_____ **Health:** Taking care of yourself, lower level of stress, physical exercise is incorporated into the job.

- _____ **Beauty:** Working close to the beauty of nature, fine art, music, literature, architecture, and/or theater.
- _____ **Security:** Health Insurance, benefits, not having to worry about present or future income or welfare.
- _____ **Stability:** Having a work routine and job duties that are largely predictable and do not change over time.
- _____ **Meaningful Work:** Work that provides personal meaning to you, allows you to make an impact, and/or matches your values.
- _____ **Respect:** A work environment in which you are treated with respect and dignity.

Which is the most important characteristic?

How can you build these characteristics into your present job?

What new job would have these characteristics?

Career/Business Goals - Example

1990

Send out 100 resumes

1993

Take Access Database programming
Read 3 Total Quality Management Books

1994

Find a job in Process Improvement/Total Quality Management

1995

Publish an article

2001

Write a screenplay (take one month off to write)

2002

Send out 5 magazine articles

2003

Make x for corporate training for x days

Career/Business Goals

Spread your career/business goals across the next 20 years.

New Position

1. Get a _____ job
2. Find a new career _____
3. Work overseas
4. Job search tasks
 - Revise my resume or curriculum vitae
 - Send out _____ number of resumes
 - Go on _____ interviews
 - Connect with a recruiter
 - Get a manager or agent

Current Position

5. Get a promotion to _____
6. Get a job in a certain location _____
7. Design a career path _____

Work Quality

8. Do a better job at work _____
9. Become more productive at work _____

Perks and Pay

10. Make _____ dollars per hour, week, month, year
11. Get a \$ _____ bonus
12. Get _____ perk(s)
13. Get _____ benefit
14. Determine if your salary is at industry standard _____
15. Seek an appropriate salary based on the industry standard _____
16. Get or ask for an _____% raise
17. Get a _____ award

Training/Education

18. Obtain _____ on the job training
19. Attend a _____ seminar.
20. Obtain a _____ professional certification

Entrepreneurial

21. Start a _____ new business
22. Build my business to \$ _____ per _____
23. Build the number of clients I have to _____
24. Get a partner _____
25. Write a business plan _____

Business Tasks

26. Get a new business card _____
27. Develop a verbal business card _____
28. Look into incorporating _____
29. Get a Business License _____
30. Set up a home office _____

Additional Streams of Income

31. Write a book
32. Write magazine or newspaper articles

33. Do a speech on _____
34. Teach a class in _____
35. Sell _____
36. Create a Side business in _____
37. Get a second job
38. Other _____

Work Life Quality

39. Work _____ number of hours per week
40. Reduce my stress_____
41. Engage in meaningful work_____
42. Do _____ type of project
43. Find work with my desired work characteristics
44. Other _____

Financial Goals

Financial Goals – 2005

1. Check on retirement
2. Make \$x
3. Save \$x
4. Pay an extra \$x on the house
5. Make \$x on investments
6. Reach \$x in savings
7. Revise Will
8. Put money in 401K and SEP
9. Do a revised plan on how much we need for retirement
10. Eliminate balance on credit card

Your Financial Goals

Income

Income Streams

Business or Job Income _____

Investment Income _____

Dividends _____

Side Business Income _____

Inheritance _____

Rental Property _____

Business Expenses _____

Taxes

Do it yourself or get a tax advisor

Ways to maximize deductions

Create Balance Sheet

Savings

Liquid Assets _____

401K/SEP Contribution _____

Obtain a financial advisor(s) __ Yes __ No

Save _____

Debt Management

Pay off credit cards _____

Pay off house by _____

Pay off car by _____

Goal Net Worth _____

Budget
Monthly Budget/Expenses
House

Payment _____
Car _____

—

Payment _____

—

Gas _____

—

Utilities _____

—

Food _____

—

Phone _____

—

Electric, Gas, Water,
Refuse _____

Dry Cleaning _____
Clothes _____

—

Hair _____
Entertainment _____

—

Recurrent Expenses
Vacation _____

—

Home
Maintenance/Improvement _____
Car _____

—

Charity _____
Business Expenses _____
Business

Equipment _____
Business

Supplies _____
Travel _____

—

Stationary _____
Educational Funds
Personal _____

—

Children_____

Austerity Measures/Cost Reduction_____

Retirement

 Monetary Needs Analysis (including inflation)_____

 Retirement Budget_____

 Income Streams

 Social Security_____

 Retirement_____

 401 K_____

 Investments_____

 Reverse Mortgage_____

 House Sale_____

 Rental Property_____

 Part Time Work_____

 Date for Retirement or Semi-Retirement_____

Risk Management

 Medical Insurance_____

 Car Insurance_____

 Short Term Disability_____

 Long Term Disability_____

 Home Owners Insurance_____

 Life Insurance_____

 Business Insurance_____

 Will/Trust_____

Relationship Goals - Example

1. Have romance night once a week (dress up, go somewhere, sit by the fire).
2. Listen to each other.
3. Call friends and family more often.
4. Visit friends out of state.

Relationship Goals

Romance: _____

Family

No. of Children: _____

Time spent with immediate family: _____

Time spent with extended family: _____

Help given: _____

Boundaries: _____

Goals for teaching/helping your children: _____

Friends

How many _____

Find new friends: _____

Meet them where: _____

Common interests/activities: _____

Characteristics

Interesting: _____ Loyal: _____ Honest: _____ Religion/Spirituality: _____

Common work: _____ Diversity: _____ Other: _____

Common Values: _____

Location: _____

Personality Characteristics: _____

Relationship Building Thoughts

1. Think Win/Win (7 Habits of Highly Successful People)
2. Seek first to understand, then to be understood (7 Habits)
3. Giving others an "A" (Art of Possibility)
4. Everyone doesn't have to think, feel, be like me to be of value to me or the world

Do You Get More Than You Give?

In some relationships, we give more than we get. This can be acceptable to us, or it may create resentment toward the other person.

In other relationships, we get more than we give and the danger is that we will be resented.

It is ideal that in a relationship there is a sense that you get as much as you give. What you get doesn't have to equate to what you give, it just has to be of value to you. For example, if I highly value receiving knowledge from someone and they value getting help with decision-making, we don't have to spend an equal amount of time on each of these activities. We just have to spend enough time on each activity that we are both satisfied with what we are receiving from the relationship.

If we are in a relationship where we give more than we get, we may want to examine this relationship and adjust it or we may want to move on from it.

The ideal relationship is one in which we gain energy (not lose energy) from being with the other person.

Key Relationship	What You Get	What You Give

Are you giving enough?

Are you getting enough?

Traditions (Holiday) – Example

4th of July

1. Have a BBQ
2. Kayak

Thanksgiving

1. Go away for the weekend
2. Make a list of what we are thankful for

Christmas

1. Watch Elf
2. Play Galaga
3. Go on a Gondola ride in the canals to see the lights
4. Go to the Boat parade
5. Give toys to Toys for Tots
6. Sit by the fire
7. Don't get stressed out by shopping or events

New Year's

1. Watch the Super Bowl
2. Make New Year's Resolutions
3. Create Goals for the next year

Lifestyle Goals - Example

1988

Buy a house with a yard.

1993

Have groceries delivered.

Hire a housecleaner.

1994

Live somewhere conducive to exercise.

2000

Move toward the ocean.

2003

Create a nice yard.

Hire a gardener to do all yard work.

2005

Don't do any work-related tasks during the weekends.

2006

Work 40 hours a week.

2007

Work 35 hours a week.

Lifestyle/Life Structure

Home Location (specify year if the goal will change later):

Environment: ___ Beach ___ City ___ Mountains ___ Lake ___ River ___ Park
 ___ Densely populated ___ Spacious

Climate: ___ Hot ___ Seasons ___ Snows ___ Rains

Near amenities: ___ Gym ___ Stores ___ Restaurants ___ Park ___ Freeway

Neighbors: _____ Ethnicity(s) ___ Blue collar ___ White collar
 _____ Age ___ Singles living ___ Children ___ Senior living

Privacy from: ___ Neighbors ___ Clients ___ Students ___ Patients

Housing Type: ___ Apartment ___ Condo ___ Town Home ___ House
 ___ Yard ___ Patio ___ Balcony ___ No Yard

Location of Work

Within _____ minutes from home

Near amenities ___ Gym ___ Stores ___ Restaurants ___ Park

No. of work hours _____

Chores

	Hours Spent	Frequency	Delegated To	Dollars Spent
Cooking	_____	_____	_____	_____
Cleaning	_____	_____	_____	_____
Gardening	_____	_____	_____	_____
Lawn	_____	_____	_____	_____
Laundry	_____	_____	_____	_____
Ironing	_____	_____	_____	_____
Errands	_____	_____	_____	_____
Paying bills	_____	_____	_____	_____
Organization	_____	_____	_____	_____

Weekend Structure:

Friday	Saturday	Sunday

Evenings Structure:

Arrive Home	
Hour 1	
Hour 2	
Hour 3	
Hour 4	
Hour 5	

Day

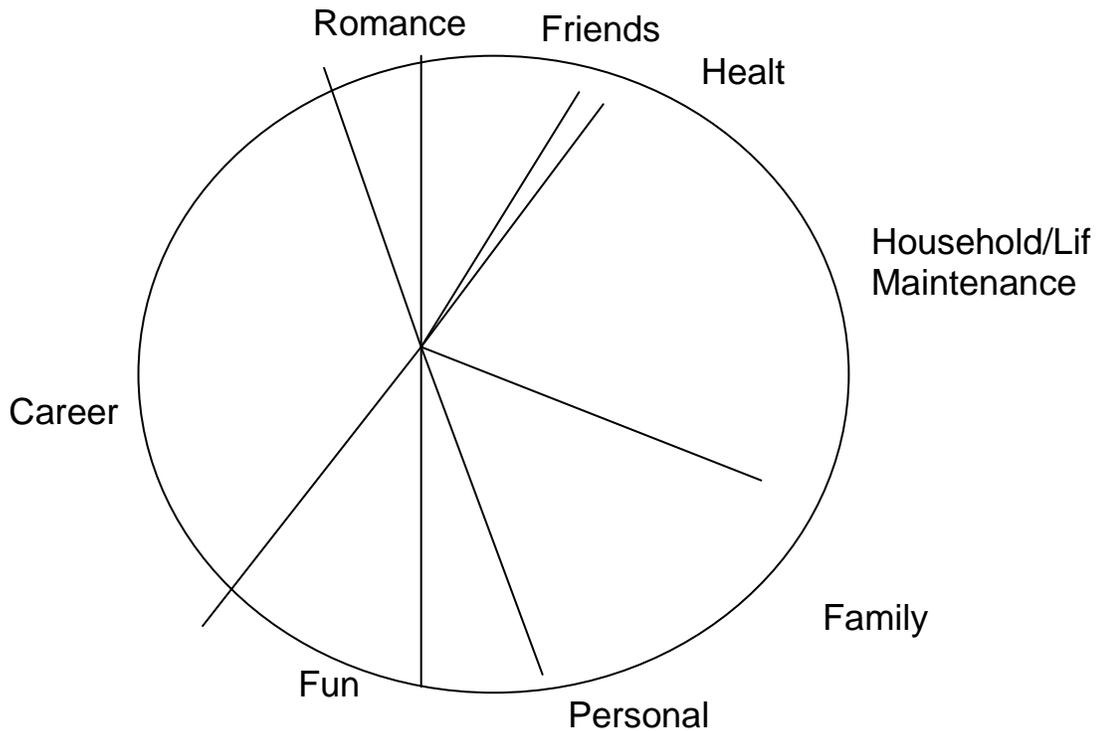
Structure: _____

Lifestyle Goals

Wheel of Life

Is your life balanced the way you would like it to be? Is the way you are spending your time in alignment with your values and priorities? You can use this wheel to evaluate how you are spending your time and to determine if want to make any shifts.

Wheel of Life Example



Wheel of Life

This wheel represents all the waking time you have available. Select the activities you currently balance in your life. Draw the sections (pie wedges) on the wheel and assign percentages to represent the relative amount of time you spend on each activity (assigning percentages is optional). Then mark the pie wedges you would like to reduce (in red) and the pie wedges you would like to increase (in green).

Household/life maintenance
Personal growth
Hobbies/Avocations

Home improvement
Health/Exercise
Family

Romance
Fun
Career/Work/Business
Volunteer work
Planning, visioning, goal setting

Travel
Friends
Spiritual
Managing finances

