



# DNA Behavior<sup>®</sup>

Behavior and Money Insights

## Goals Discovery



# Goals Discovery Worksheet

Use this worksheet to rank goals from the list or add your own, indicate if goal is a Need (N) or Want (W) and if it is long term 5+ years (L) or short term 0-5 years (S) then complete the worksheets on the last two pages to have a Goals Plan for yourself. We left an Other slot for you to add your own goal.

Career and Business Goals	Rank	N/W	L/S
Increase my salary			
Change my current role based on passion			
Set up my own business			
Expand my business operation			
Reduce my time at work			
Be trained for a second career			
Retire before 60 yrs old			
Set up a family business succession plan			
Modify my role for greater work-life balance			
Set up a business based on my hobbies/interests			
Take a sabbatical			
Other:			
Other:			

Relationships	Rank	N/W	L/S
Socialize with friends more regularly			
Entertain more regularly			
Spend more time with family			
Make provision for only one family income			
Provide for my children S education			
Provide financial help for my children/grandchildren			
Provide funds for the care of my parents			
Provide funds for child's wedding			
Leave an inheritance for my family			
Invest in making more connections			
Educate my children on financial matters			
Organize family meeting to discuss plans			
Other:			
Other:			

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Health	Rank	N/W	L/S
Join a fitness center			
Join a sports club			
Participate in a dieting program			
Have a health check-up			
Have a dental check-up			
Purchase fitness/sports equipment			
Purchase medical insurance			
Protect my lifestyle against illness			
Protect my earnings against disability			
Protect my family against the financial consequences of death			
Other:			
Other:			

Recreation	Rank	N/W	L/S
Enroll in continuing education classes			
Start/pursue a hobby			
Vacation/travel regularly			
Dress in the latest fashion			
Vacation without budgetary constraints			
Regular vacations without working			
Join a social club or association			
Invest in once in a lifetime experiences			
Purchase a vacation home			
Spend on activities without financial concern			
Other:			
Other:			

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Community	Rank	N/W	L/S
Give 10% of income to worthy causes			
Give less than 10% of income to worthy causes			
Volunteer time to a worthy cause			
Work for a foundation, charity or ministry			
Increase my giving to worthy causes			
Leave funds on my death to worthy causes			
Join a non-profit board			
Set up my own foundation			
Other:			
Other:			

Financial	Rank	N/W	L/S
Earn my current income in retirement			
Increase my savings			
Increase my current wealth by 50%			
More than double my current wealth			
Have financial freedom in retirement			
Purchase a home			
Refurbish a home			
Buy a luxury car			
Collect art, jewelry, and other valuable items			
Prepare or update my will			
Update my power of attorney			
Purchase an investment property			
Other:			
Other:			

# Goals Discovery For \_\_\_\_\_

Indicate your top NEEDS in the short term and long term category

Short Term Needs	Long Term Needs
1	1
2	2
3	3

# Goals Discovery For \_\_\_\_\_

Indicate your top WANTS in the short term and long term category

Short Term Wants	Long Term Wants
1	1
2	2
3	3

# Exercise: Setting Quality Life Goals

## Step 1

## About Setting Goals

The foundations for setting your Quality Life Goals are:

- **Your Financial Needs and Wants.** They help identify what is crucial for your life and what is desired at various stages of life.
- **Your Life Purpose.** It helps prioritize the activities you may engage in and on what you will spend and invest your money.
- **Your Current Environment.** It reflects where you are now. This is the starting point.

Your goals should be monitored quarterly and regularly updated.

**Exercise:** Write down up to a total of 30 long term Quality Life Goals on the following page in any of the categories listed below. You should have at least 1 goal in each of these categories. Also, identify the time frame in which you want to achieve them.

Categories:

1. Career
2. Relationships
3. Health
4. Recreation
5. Community
6. Financial

Most people can set 10 goals easily. The next 20 are difficult, but this is where you are getting to the core of your life.

# Exercise: Setting Quality Life Goals

## Step 2

## Setting Your Goals

“Goal setting is more than lifestyle planning, it is about introducing the journey of life into the process and recognizing a person’s unique behavioral style.” – *Hugh Massie*

*SMART goals are most effective. They are Specific, Measurable, Attainable, Realistic, and Time-based. Keep this in mind as you work on your list.*

	<u>Quality Life Goal</u>	<u>Category</u>	<u>Time frame</u>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

# Exercise: Setting Quality Life Goals

	<u>Quality Life Goal</u>	<u>Category</u>	<u>Time frame</u>
16.			
17.			
18.			
19.			
20.			
21.			
21.			
22.			
23.			
24.			
25.			
26.			
27.			
28.			
29.			
30.			