



## 5-Year Vision

Today's Date: \_\_\_\_\_ 5 Years from Now: \_\_\_\_\_

### 1) Vacations:

- I. \_\_\_\_\_
- II. \_\_\_\_\_
- III. \_\_\_\_\_

Long Weekends:

- IV. \_\_\_\_\_
- V. \_\_\_\_\_
- VI. \_\_\_\_\_

### 2) Stuff/Toys: (i.e. cars, boats, etc.) What do you want to acquire? Dream big!

- I. \_\_\_\_\_
- II. \_\_\_\_\_
- III. \_\_\_\_\_

### 3) Cash Assets:

Current

5 Years from Now

Stocks:	_____	_____
401K:	_____	_____
Mutual Funds:	_____	_____
Cash:	_____	_____

### 4) Giving:

Cash

Time

Monthly:	_____	_____
Yearly:	_____	_____
Where:	_____	_____

**5) Accomplishments:** (i.e. writing a book, charities, sports goals, etc.)

- I. \_\_\_\_\_  
II. \_\_\_\_\_  
III. \_\_\_\_\_

**6) Fitness & Health:**

Current

5 Years from Now

Weight: \_\_\_\_\_  
Activities: \_\_\_\_\_

**7) Describe Changes in Business:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**8) Hours:**

Current

5 Years from Now

\_\_\_\_\_

**9) Income:**

Current

5 Years from Now

\_\_\_\_\_

Units: \_\_\_\_\_ Commission: \_\_\_\_\_  
Net Income: \_\_\_\_\_ Expenses: \_\_\_\_\_

**10) Describe Current Team:**

\_\_\_\_\_  
\_\_\_\_\_

**11) Describe New Team:**

\_\_\_\_\_  
\_\_\_\_\_

**12) Love Life:**

Things You Like

Things You Don't Like

---

---

---

---

Changes in 5 Years:

---

---

---

---

**13) Real Estate:**

Current Value

Value 5 Years from Now

Primary: 

---

---

Secondary: 

---

---

Rentals: 

---

---

Commercial: 

---

---