



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:
