

ANNUAL PLANNING EXAMPLE

LIFE VISION

HEALTH AND WELLBEING

BIG VISION	SPECIFICS

WEALTH AND CAREER

BIG VISION	SPECIFICS

FILL IN YOUR ENTIRE LIFE VISION HERE SO IT IS ALL IN ONE PLACE

ANNUAL PRIORITIES

(10-15 things that MUST be completed in the next 12 months. You can mix career & personal or keep them separate)

1. Get Promoted to Level 27 in December 2017 promotion cycle
2. Establish KPMG unity branch in Sydney and host inaugural event
3. Complete 4x Melbourne networking trips

4. Put Stevie's name down at Newington College or another agreed school
 5. Complete 2016/2017 tax return
 6. Establish family budget and savings
 7. Achieve my pre 2nd pregnancy physique goal
 8. Fall pregnant again
 9. Schedule and book 2x family holidays
 10. Complete garden renovation
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QUARTERLY PRIORITIES

(Q1, Q2, Q3, Q4 - Divide your annual priorities here)

Q1 *(INSERT DATES OF YOUR QUARTER)*

- Complete family budget and savings plan
- Categorise direct debits
- Update insurance policies
- Book Melbourne trip
- Organise and Host KPMG event
- Complete development assessment paperwork for promotion

Q2 *(INSERT DATES OF YOUR QUARTER)*

- Review compliance with family budget and savings plan and make adjustments if needed
- Complete 16/17 tax return
- Agree and priorities family expenses for the next 12 months (home improvements, holidays)
- Book Melbourne Trip
- Book Family holiday #1
- Celebrate Promotion!
- Complete KPMG development plan and Q2 goals

Q3 (INSERT DATES OF YOUR QUARTER)

- Review compliance with family budget and savings plan and make adjustments if needed
- Put Stevie's name down at agreed school
- Complete garden renovation
- Book Melbourne Trip
- Launch 2x JV/partnerships
- Attend CPD conference

Q4 (INSERT DATES OF YOUR QUARTER)

- Complete Annual Planning for 2018/2019
 - Review compliance with family budget and savings plan and make adjustments if needed
 - Book Melbourne Trip
 - Book Family holiday #2
 - Book review and mentoring session with Michael
 - Attend industry networking event
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WEEKLY TASKS

(Maximum 5 things that must be achieved that week, from the quarter you are working from)

Week commencing (insert date)

- Review current financial position
 - Confirm dates for Melbourne trip
 - Confirm feedback from JV with X Bank
 - Seek marketing input on XXX business case
 - Complete module 6 of Chase Life
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DAILY TO-DO

(3 things you MUST tick off that day)

MONDAY

- Watch videos XYZ from module 6 Chase Life
- Email Andy and chase contracts
- Confirm Melbourne flights

TUESDAY

- Watch videos XYZ from module 6 Chase Life
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WEDNESDAY

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LOWER PRIORITY / LOWER IMPORTANCE TO DOs

(Note that if something has been on your to do list more than 14 days - remove it! It is not important!)

- Rearrange Cleaner by Thursday
 - Review car insurance by Fri COB
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