



## PLAN THE LIFE YOU WANT

We all have goals, dreams, and moments we imagine for the future. But life gets busy, and those goals can get buried beneath the everyday. This tipsheet is your prompt to pause, reflect, and set intentions that support the life you truly want.

At Onelife Financial, we help our clients bring those goals to life, step by step, one decision at a time. Whether you're planning for a holiday, retirement, a new home, or simply more freedom, it all starts here.

01

### DREAM BIG

**TIP:** Give yourself permission to think freely. Don't limit your goals to what feels 'realistic' just yet.

**Ask Yourself:**

What would I do more of if money wasn't a barrier?

What experiences or freedoms do I want to create for myself and my family?

02

### DEFINE YOUR GOALS

**TIP:** Make each goal tangible and time-bound. Clarity beats perfection.

**Ask Yourself:**

What does success look like for this goal?

When do I want to achieve it, and what will it take?

03

### TAKE ACTION

**TIP:** Focus on the next right step, not the entire staircase.

**Ask Yourself:**

What's one thing I can do this week to move closer to this goal?

Do I need support or accountability to stay on track?

04

### CHECK IN, EVOLVE

**TIP:** Goals aren't set in stone, review and adjust them as life shifts.

**Ask Yourself:**

Is this goal still aligned with what I value most?

What have I learned since I set this goal?

**BONUS TIP:** Get started with our [Goal Setting Worksheet](#) or head to our website and do our [Financial Health Check here](#).

LET'S TALK

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# GOAL SETTING

"When your goals are aligned with your values, every decision becomes easier, and your future becomes clearer." — **Daniel Grusd.**

## YOUR GOALS

1

## MOTIVATION

2

## ACTION ITEMS

3

## FINANCIAL COMMITMENT

4

## ROADBLOCKS & REALITY CHECK

5