

Kidz Make Cents
2009 Financial Intention and Goal Worksheet

If you choose, you can have what you want next year. But you have to **DECIDE** right now that you are in control of what happens to you. You have to **DECIDE** that you are a co-creator on this planet. And you have to **DECIDE** right now that you are worth it.

FINANCIAL EVALUATION

0	1	2	3	4	5	6	7	8	9	10
Need Help		Getting By			Just Ok			Very Pleased		Excellent

My current yearly earned income is: \$ _____

My current yearly passive income is: \$ _____

My current overall financial picture is:

BUSINESS/CAREER EVALUATION

0	1	2	3	4	5	6	7	8	9	10
Need Help		Getting By			Just Ok			Very Pleased		Excellent

My current results in my **BUSINESS/CAREER** are:

Apply the Financial Freedom Formula to your current situation:

Financial Freedom = Working/earned Income + Passive Income + Investment
Income + Savings + Simplification

***Simplification is important because financial freedom is possible when your Passive Income is greater than the Expenses of your desired lifestyle.

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Do you have enough Working/earned income to facilitate the creation of passive and investment income and a savings fund? All while paying for your expenses!

The reality is that if your expenses are greater than all your streams of income only two things can happen!

- 1) Increase your income
- 2) Decrease your expenses

That's it! Pretty simple mathematically ... most of us are confused by our finances because we don't like the options. Make more money or spend less!

2009 Financial Goals

1) FOCUS

Pick one financial goal for 2009 to start with. Be very specific and limit it to one!
For example, I will make \$ 9, 965.80 more in earned income by March 31, 2009.
I will have my 2008 tax return filed by April 30, 2009.

2) ATTRACTION

Know what you want to attract and bring into your life. Be very clear on your inner core values as these are what will motivate you to have the discipline to reach your financial goals. Most of us are motivated by our emotions and not our rational thinking, so by having an emotional connection to our values and using that to motivate us to achieve our financial goals will be much more powerful in attracting money into our lives (as opposed to the emotional or retail therapy most people do). Write down at least 3 core values or reasons why your financial goals are important (ie. Family, time with friends, etc.)

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3) ACTION

Focusing on your goals and having desire or intention are not sufficient to achieve your financial goals. It requires taking action consistently everyday! You must put an action plan into place that will support your financial goals.

Do one action per day for a minimum of 15 minutes that focuses on your one financial goal (maybe 5 phone calls, or making a little extra effort to network while out, balancing and recording your financial transactions!). You can have an action plan that says what you will do this week, this month, and each quarter but the power of action lies in what you are willing to do for 15 minutes each day.

The reality is that we only have each moment and each day to act. Tomorrow starts new and what you didn't do today is lost. The power of now and taking action today is the most impactful thing you can do to achieve your financial goals in 2009.

Specifically list one thing you will do each day for 15 minutes (minimum...you can always do more!) that will support you in achieving your financial goal.

CELEBRATE Your Successes and Be Grateful

To help you focus on your daily successes and build momentum, write down three successes at the end of each day and three things that you are grateful for.

When we focus on what we have accomplished, we are motivated to keep going. It's really easy for most of us to remember what we didn't do and what didn't work without writing it down. So log your successes and gratitudes each day. If you can tie them into your goals (specifically for your financial goals), that is very powerful.

This worksheet can be done for the other areas in your life like health, relationships, spirituality, contribution or service.

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