

2022

Extraordinary Business Creation Plan

BY ELLEN ROGIN, CPA, CFP®

2021 year in review:

Business Yays!

What was awesome in your business in 2021? List all the wonderful, miraculous, planned and unplanned, things that happened during the year.

What are you most grateful for in 2021:

What & Who supported you through 2021:

List people you connected with, people who supported you, online communities, books you read, courses you took, places you visited, new perspectives that helped you in 2021.

2021 Financials:

List your revenue sources (for example, financial planning fees, AUM fees, insurance commissions etc.) and your income from each source.

Total Revenue in 2021:

Total Revenue in 2020:

% change

2022 Income goals:

List goals by revenue source and make sure to add a category called "Other" – for unexpected revenue.

Total 2022 Income:

3-4 Year Mega-Goals:

What would you just love to see happen in your business in the next 3-5 years? For example:

Within the next three to five years I build a profitable business that nets \$XXX. This allows us to donate \$YYY to causes we believe in (or fully fund our kid's education plan, or pay off our mortgage, etc.) I work with an aligned and inspired team who treats my business as if it is theirs. I absolutely love my work and know I am making a significant difference in the lives of our clients...

2022 Vision:

Big Word or Theme for 2022:

Chose a word or theme to guide you through the next 12 months. Pick one that has you feeling encouraged, inspired, energized, expanded. You can't get this wrong so don't worry!

My Big Word for 2022:

Wouldn't it be cool if...

Top 3 goals that will move my vision forward

1. Vision/Goal:

Why is this important to me?

How will I feel when I achieve this?

Generosity Velocity:

Who else wins with this goal? How does accomplishing my goal support others?

Potential Blocks:

What might keep me from achieving this?

Potential Cures:

If this happens what might help me?



Gain Traction through Action:

To make this vision a reality –

What I need to do:

What I need to learn:

Who I need to connect with:

Who can support me in this process:

2. Vision/Goal:

Why is this important to me?

How will I feel when I achieve this?

Generosity Velocity:

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Dear 2022 letter

Write a letter to 2022 with your wishes, dreams, hopes, and desires. Be open to what 2022 writes back!

Dear 2022,

*I am open, ready, welcoming,
and grateful for all the good
that flows to me in 2022.*

*May these goals and desires,
or something even better,
manifest easily and for the
highest good of all.*

Signed: _____

Date: _____



Let's stay connected! Please let me know how your goals are progressing. I have a great feeling about 2022 for you!

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