

2023 From Goal Setting to Goal Getting

BY ELLEN ROGIN, CPA, CFP®

2022 year in review:

Business Yays!

What was awesome in your business in 2022? List all the wonderful, miraculous, planned and unplanned, things that happened during the year.

What are you most grateful for in 2022:

What & Who supported you through 2022: 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 2022.

2022 Financials:

List all of your revenue sources (for example salary, various fees, commissions, investments, etc.) and the amount of your income from each source.

Total Revenue in 2022:

Total Revenue in 2021:

% change

2023 Income goals:

List goals by revenue source and make sure to add a category called “other” – for unexpected revenue.

Total 2023 Income:

3-5 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 me/us to donate \$YYY to causes I/we believe in (or fully fund our kid's education plan, or pay off the 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 clients, customers, etc...

2023 Vision:

Big Word or Theme for 2023: 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 2023:

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 2023 letter

Write a letter to 2023 with your wishes, dreams, hopes, and desires. Be open to what 2023 writes back!

Dear 2023,

*I am open, ready, welcoming
and grateful for all the good
that flows to me in 2023.*

*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 2023 for you!

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