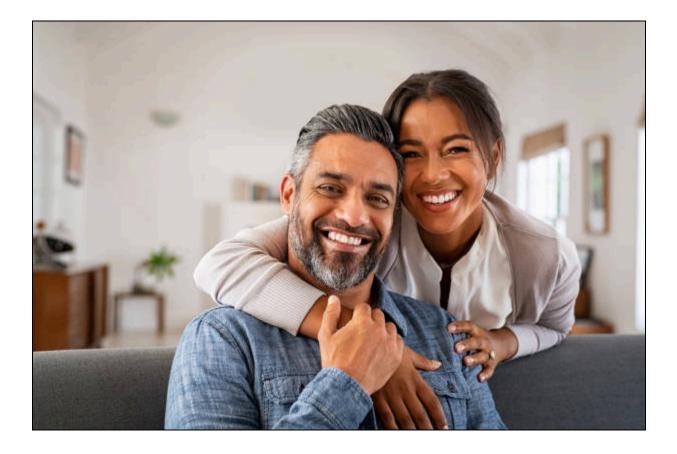
Joe Schmoe Vision Plan TEMPLATE April 2024





1. Mission Statement:

- What is my purpose and my reason for being here on earth?
- Craft a clear and inspiring vision statement that encapsulates your aspirations and purpose in life. It should be concise, motivating, and reflective of your values and long-term goals.

SAMPLE TEXT:

My purpose for being on this Earth is to influence, encourage and invest in all that surrounds me. Having only this short time, and I want it to be the absolute best that I can make it, by that I'm wanting to create a comfortable, caring and relatable environment for my family, friends and employees.



2. Vision Statement:

• Imagine the sweet smell - sound, look and feel - of success. You can figure out what stands between where you are and where you want to be and how you'll travel the distance until you can clearly see your destination.

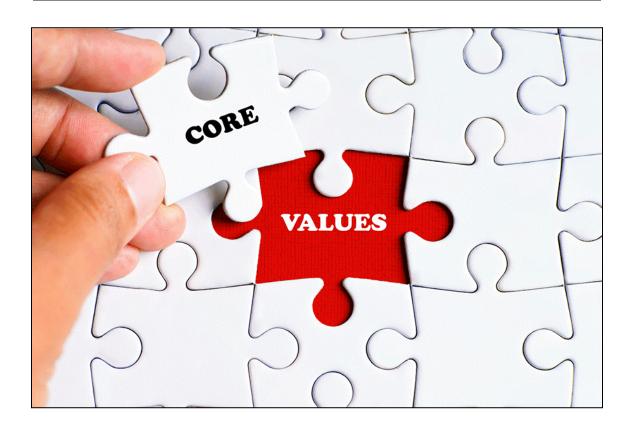
SAMPLE TEXT:

The success of my business and other personal ventures have led me to a road of relaxation, release and wealth. I'm now capable of creating a new, healthy environment that allows me to live a life of luxury and happiness.

I have dominated doubt and failure to create a new living and breathing soul that now relinquishes the fruits of my labor. I'm comfortable and now capable of handling and managing new ideals, ventures and situations. I am me.

My personal vision is to lead a purpose-driven life filled with growth, compassion, and meaningful connections. I aspire to continuously learn, evolve, and contribute positively to the world around me.

Guided by integrity and empathy, I seek to inspire others to embrace their authenticity and pursue their passions with courage and resilience. In every endeavor, I aim to leave a lasting legacy of kindness, impact, and empowerment.



3. Core Values:

• Identify and list your core values. These are the guiding principles that shape your decisions and actions. Aligning your life with your values enhances authenticity and fulfillment.

- Caring
- Growth
- Educating
- Boldness
- Creativity
- Courage
- Identity



4. Long-Term Goals:

What does success look like in your life?

SAMPLE TEXT:

FINANCE:

- I have multiple, revenue generating business flows that consistently outperform previous years. A staff that is consistent, motivated and inspirational.
- I have built a healthy and productive financial portfolio that allows me to travel, and enjoy life without bounds.
- I am extremely successful, having a home in Palm Springs, and multiple homes in Florida, generating large amounts of wealth monthly that allow us to live comfortably.
- Both my partner and I have created an ever-positive evolving world of financial security and safety.



HEALTH:

- A habit forming exercise routine that becomes second nature.
- Have a healthy habit of eating correctly (portion sizes, low/no sugar/carbs)
- I am at my ideal weight and muscle tone and accept myself for exactly who I am

LOVE:

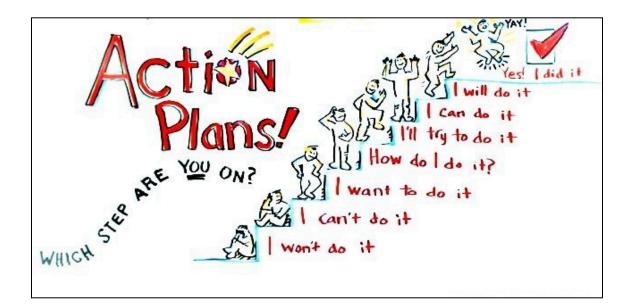
- My partner and I are emotionally and economically stable. We love each other unconditionally and are a great support system to one another.
- We have both healed from our past and have healthy open communication
- We are married and living a very happy and successful life.



5. Short-Term Objectives:

• Break down your long-term goals into smaller, manageable tasks. These short-term objectives serve as stepping stones towards your larger aspirations.

- **Clients:** I will have 2 new full-paying clients by the end of xxxx
- Travel: I will have enough resources to travel to Europe for Christmas
- Website: I will have my website completely finished with a smooth workflow by xxxx
- Love: I will talk with my partner about these 2 things that have been weighing heavily on my mind by xxxx
- **Health**: I will completely cut sugar out of my diet and go to the gym 4x per week



6. Action Steps:

SAMPLE TEXT:

• Define specific actions you will take to achieve each short-term objective. Be realistic, setting achievable and measurable steps to track your progress.

1. Clients:

In order to have 2 new full paying clients, I will do outreach to at least 100 people on Linkedin

2. Travel

I will need \$5k to travel to Europe and will start saving \$200/week I will stop eating out

3. Website:

I will hire a qualified web developer like Epic Entrepreneur Media and Dennis Berry

4. Love:

I will write down exactly what I need to do to speak with my partner and approach them with confidence and establish healthy boundaries... I will do this in the next 72 hours

5. Health:

I will remove all sugar and processed foods from my house and only prepare food at home



7. Accountability and Tracking:

• Establish a system for accountability, whether through a journal, a coach, or a support network. Regularly assess your progress and adjust your plan as needed.

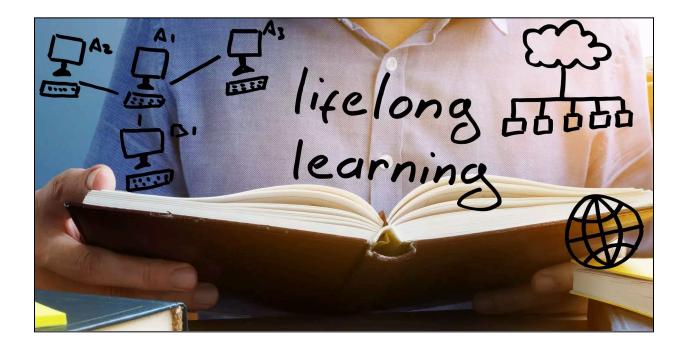
- Work with Dennis weekly
- Review and repeat positive affirmations and vision board
- Commit to complete goals and increase productivity
- Allow myself to believe in myself and push forward with goals.



8. Celebration and Reflection:

• Acknowledge and celebrate your achievements, no matter how small. Reflection is crucial for growth, helping you learn from experiences and adjust your plan accordingly.

- Take more trips to Palm Springs and places I enjoy... monthly staycations.
- Would like to go to see family very regularly
- More trips to the beach



9. Continuous Learning and Adaptation:

• Embrace a mindset of continuous learning and adaptability. Stay open to new opportunities, insights, and experiences that align with your evolving vision.

SAMPLE TEXT:

- Read at least 1 book/audible a month
- Continue to participate in groups, business networking
- Work harder to stay organized and accountable
- Constant communication with wise friends and family again

If you have any questions, please reach out:

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