YEARLY *Planning* GUIDE



1-YEAR **3-YEAR** **5-YEAR VISION**

*Build the **life.** Build the **business.** Build the **future.***

PERSONAL **PROFESSIONAL** **FINANCIAL** **PROTECT**



Detailed *goals, habits, milestones* and a 12-month roadmap.

MARIANA GISELLE | Helping business owners build, accelerate and protect their growth.

HOW *To Use*

Print it. Write in it. Keep it where you will see it.



1

PLAN THE YEAR

Fill in the Life Dashboard first. Then complete one page each for personal, professional and financial.

2

MAP THE QUARTERS

Put your goals on the 12-month roadmap. Add your insurance renewal review dates now, not later.

3

CHECK IN WEEKLY AND MONTHLY

Use the weekly scorecard and the monthly review questions to stay accountable.

PERSONAL | PROFESSIONAL | FINANCIAL | PROTECTION | ROADMAP | WEEKLY

A good plan is built by *repeatable standards,* not dramatic moods.

LIFE *Dashboard*

Current focus and future vision. One line per goal.



	1-YEAR PLAN	3-YEAR PLAN	5-YEAR PLAN
PERSONAL			
PROFESSIONAL			
FINANCIAL			
PROTECT			

CORE FOCUS NOW

- Priority 1
- Priority 2
- Priority 3
- Priority 4
- Priority 5

Build the *life.* Build the *business.* Build the *future.*

PERSONAL *Vision*

Faith or values, health, lifestyle and relationships. Use what fits your life.



FAITH & VALUES

- Daily practice I will keep
- Where I want more peace
- Boundaries I will set
- Decisions I will make from values
- A life that feels ordered

HEALTH & ENERGY

- Training goal
- Sleep and energy habit
- Meal or hydration routine
- What I will stop doing
- How I want to feel

LIFESTYLE

- Trips I will take
- My home and space
- Books I will read
- Hobbies and routines
- A life worth living now

RELATIONSHIPS

- Standards I hold
- What I give
- What I expect
- Community I build
- Boundaries I keep

PERSONAL NON-NEGOTIABLES

PROFESSIONAL *Strategy*

Career or business: skills, systems and where you are building.



YEAR 1: FOUNDATION

- Credential or skill to finish
- What I will learn
- Core offer I will master
- Income or output pace
- Path I am choosing

YEAR 3: EXPANSION

- Income or profit goal
- Systems to build
- People or partners
- Target clients
- Compliance and records

YEAR 5: OPTIONS

- Reputation I am building
- What I own or run
- Team or support
- Documented processes
- How success funds my life

CORE SKILLS TO MASTER

- Skill 1
- Skill 2
- Skill 3
- Skill 4
- Skill 5

CURRENT FOCUS *this quarter:*

FINANCIAL *Strategy*

Income, debt, savings, credit, housing, investments. And protection.

1-YEAR TARGETS

- Income target
- Budget I will build
- Debt I will pay down
- Savings or reserve goal
- Coverage I will review

3-YEAR POSITION

- Debt goal
- Emergency fund goal
- Credit goal
- Retirement contributions
- Coverage I will have

5-YEAR VISION

- Income and reserves
- Investing goal
- Housing or equity
- Lifestyle I am funding
- Protection plan

MONEY RULES

- Review money weekly
- Track spending monthly
- Pay yourself first
- Keep taxes organized
- Review coverage before renewals

PROTECT IT: RENEWAL CALENDAR

List each policy and when to review it, 60 to 90 days before renewal.

POLICY OR COVERAGE	CARRIER / AGENT	RENEWAL DATE	REVIEW BY

INCOME · DEBT · SAVINGS · CREDIT · HOUSING · INVESTMENTS · PROTECTION

12-MONTH *Roadmap*

Quarter by quarter execution plan. Add your renewal review dates.



Q1

- Goal
- Goal
- Goal
- Money
- Renewal review

Q2

- Goal
- Goal
- Goal
- Money
- Renewal review

Q3

- Goal
- Goal
- Goal
- Money
- Renewal review

Q4

- Goal
- Goal
- Goal
- Money
- Renewal review

YEAR THEMES

- Theme 1
- Theme 2
- Theme 3
- Theme 4
- Theme 5

Progress is *quarter by quarter.* Review the plan before each one starts.

WEEKLY *Operating System*

The habits that build the next version of your life.

THE DAILY 5

- Faith, values or reflection
- Move your body
- Money: create, protect or manage
- Career: highest-value task
- Order: one thing that keeps tomorrow from becoming chaos

WEEKLY SCORECARD

HABIT	TARGET	M	T	W	T	F	S	S
Money review (any change that affects coverage?)								
Weekly planning								
Workouts								
Career actions								
Reading								
Family or social connection								
Fun or rest activity								

MONTHLY REVIEW

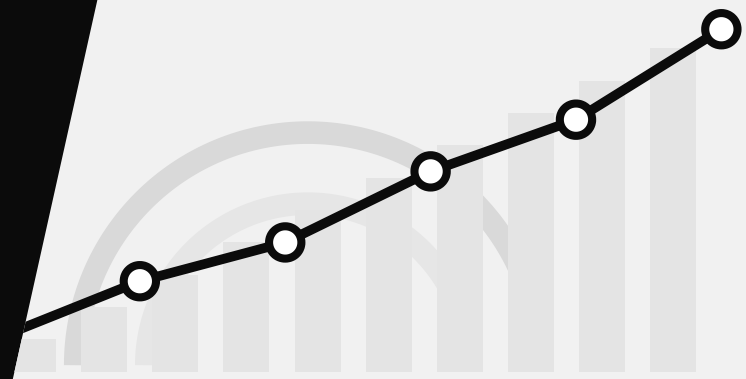
WHAT MOVED ME FORWARD?

WHAT CREATED CHAOS?

WHAT DO I NEED TO IMPROVE?

PROTECTION CHECK: WHAT CHANGED?

WHAT WILL I FOCUS ON NEXT MONTH?



»»»»»»

BUILD THE LIFE.

Protect the growth.

Every other week I send one practical growth idea by email, called The Growth Ledger.

marianagiselle.com/newsletter

General information only, not an offer of coverage or financial, tax or legal advice.