Three-year goal statement worksheet.

The three-year goal statement allows you to create a roadmap for how to achieve your dreams by summarizing exactly where you'd like your life to be three years from now. It should include things like net worth, how you're managing your money, what you do for work, the ways in which you'll be spending your time, and the type of people you want to have in your life. We like to use the 5 Fs—friends, family, finance, fitness, and faith—to build these statements around.

Example goal statement

By January 1, 2028, I will be a mid-level associate at a consulting firm like Deloitte, making $200,000 a year. I will live with my girlfriend in a two-bedroom apartment in our favorite neighborhood of San Diego, where we pay no more than $3,500 a month in rent and no more than $300 a month in car loans. I'll be consistently putting aside 20% of my income into savings, and because I will have already built a six-month emergency savings fund, the majority of that money will be put towards a down payment on a home. I will be strong and healthy, and will take care of my body and my mind by working out no less than three times a week (preferably more). I'll have strengthened my relationship with my brother, and we talk regularly. I'll also be surrounded by friends who share my hobbies and interests, and we'll go surfing together on the weekends. I'll make the most of my vacation days, and will travel to one new country a year.

Creating your own goal statement.

Before you jump into writing your own three-year goal statement, take some time to brainstorm what you'd like your life to look like in the following areas. Remember, be as specific as possible! Then, use what you've written in each of these boxes to create a goal statement.

Finance

Friends

Fitness

Family

Faith

Career

Three-year goal statement