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Design Statement Instructions

The purpose of the design statement is to act like a navigation system towards the goals that are most important to you in the next six months.

The exercise is to reflect on what you want to accomplish in 180 days and then consistently (daily) read the brief document.

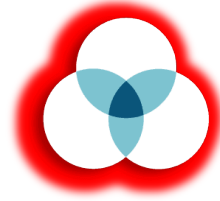
The exercise is similar to a vision statement but in a shorter time frame and in a more condensed format to increase the likelihood that you consistent read it.

This exercise can be used for professionals in any industry, however it could be a great tool for professionals in the financial advice field. Most financial plans start with goal planning so it would only make sense that all professionals in the industry have thought intentionally about their next six months!

The design statement may be a powerful tool while interviewing for a new position. It may be an impressive supplement to your resume! The resume can share where you have been and you design statement can share where you are going.

Your Name Here

My Design Statement +



Write the future reflection date, no more than six months away.

It is.....day, month, date, year....

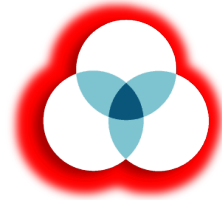
I am at _____ and am feeling _____.

Next, write three statements in the present tense (not future) on what you will focus on or change within the time period to ensure you achieve your goals.

Clearly state the most important measurable goals to achieve in this time period. Be clear, concise and specific. Do not commit to more than three goals.

Add pictures that will help you visualize the attainment of your goal, the items you need to focus on or the perhaps the other people in your life that will benefit from the achievement of your goals.

My Design Statement +



It is December 31st, 2021.

I am spending the holiday weekend at Snowy Slopes ski resort celebrating a great finish to the year.

Over the past six months I have focused on:

- Sticking to a consistent and ideal calendar every day
- Studying for my CFP for an hour a day, every weekday
- Speaking up and asking for more direction when I need it

Over the past six months I have accomplished:

- Helping the practice get to 25% growth rate for the second half of the year
 - Helped the practice attract 12 new clients
- Spending 1 afternoon per month, besides holidays, with my daughter



