

Long-Term Goal Setting Example 1

Long-Term Goal example 1: Organize Important Household Papers: Identify important household papers you need and organize them for appropriate use and safe-keeping by one year from now.

*Is your goal SMART? Is it specific, measurable, mutual, attainable, realistic, and relevant?
Do you have the resources to achieve it and have you set a timeline?*

Tasks	Priority (top task is # 1)	Approximate cost (if any) or resources needed	Target start date	Target completion date
Short-term (less than 3 months): Inventory documents on hand and collect in secure location.				
Browse home files for important household papers	1	Time	1/12	1/15
Browse other storage locations for needed documents – drawers, boxes, office, attorney, computer, etc.	2	Time	2/1	2/10
Inventory safe deposit box	3	Time Notebook or worksheets	2/20	2/20
Intermediate-term (3 to 6 months): Identify missing documents needed and sources for securing or replacing them.				
Identify missing documentation that is needed for personal use	4	<i>Which Papers to Keep</i> section in the Organize Your Important Household Papers learning lesson	3/1	3/8
Identify sources for acquiring, replacing, or updating documents	5	<i>How to Replace Papers</i> section in the Organize Your Important Household Papers learning lesson	3/25	4/15
Make contacts to acquire needed documents	6		5/1	6/1
Complete household inventory	7	<i>Household Inventory</i> worksheet	7/1	8/1

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Long-term (a year or more): Organize important household papers for personal use and safe keeping.				
Identify desired storage locations and place documents in appropriate locations	8	<i>Where to Keep Papers</i> section in the Organize Your Important Household Papers learning lesson	9/1	10/1
Create and maintain an inventory of important household papers and where each is kept	9	<i>Record of Important Papers</i> form	11/1	12/30

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