

UNIT ONE

Goal Setting

Activity 1.2 - Differentiating between short, medium and long term goals.

Complete the activity below.

YOUR ROAD MAP TO Investing!

GOALS



1

PERSON	AMOUNT TO BE SAVED	AMOUNT SAVED EACH MONTH	NUMBER OF MONTHS	NUMBER OF YEARS	SHORT, MEDIUM OR LONG TERM GOAL
Anya	\$1200.00	\$20.00			
Brent	\$100.00	\$10.00			
Cherise	\$720.00	\$30.00			
Daniel	\$600.00	\$50.00			
Emily	\$90.00	\$30.00			
Frank	\$3,600.00	\$100.00			

ANSWERS ARE AT THE BACK

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Activity 1.3 - Setting your own goals



WORK SHEET

GOALS	TOTAL COST	START DATE	TARGET DATE	MONTHLY SAVINGS
SHORT-TERM				
INTERMEDIATE				
LONG-TERM				

Questions for you to consider when setting your goals.

- 1) What resources other than money do you think you will need to achieve your goal?
- 2) What can you do this week/ month towards reaching your goal?
- 3) Do you have to cooperate with others or are you dependent on others to achieve your goals?
- 4) Can you create smaller goals to help achieve your long-term goal? What are some small things that you can do towards achieving your goal?
- 5) Will anyone else be affected or impacted by the goal?

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Activity 1.3 - Setting your own goals



WORK SHEET

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Questions for you to consider when setting your goals.

- 1) What resources other than money do you think you will need to achieve your goal?
- 2) What can you do this week/ month towards reaching your goal?
- 3) Do you have to cooperate with others or are you dependent on others to achieve your goals?
- 4) Can you create smaller goals to help achieve your long-term goal? What are some small things that you can do towards achieving your goal?
- 5) Will anyone else be affected or impacted by the goal?

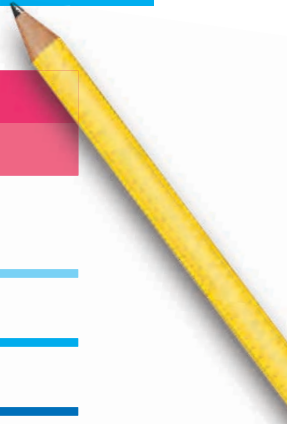
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Activity 1.4 - TIMELINE – Looking at my Life, Past and Future



TIMELINE



YEARS

5

10

15

20

25

30

35

40

45

50

WILL HAPPEN BY AGE

- Create a timeline with 10 year increments starting at 10 all the way up to 100.
- Write dates or events that have already happened in your life.
(School dates, family events, special friendships, awards received, sad events)
- Write at least three things you expect to happen by the age of 20.
(Graduate from tertiary education, finishing up tertiary education, getting your driver's license, buying a car, getting a part-time job)
- Write at least three things you hope will happen in your adult life after 20.
(Getting a job, buy a car, travelling to specific destinations, completing an Undergraduate Degree)
- Write at least three things you hope will happen over 50.
(Own a home, have a family, visited various parts of the world, have a Doctorate)