

Year in Review Audit

REVIEW & REFLECT ON _____

What were your 20__ Goals? List each goal and check whether or not you accomplished the goal.

Goal

Achieved?

Y

N

Why? Why not? This section is important as it will help you determine what you did great or what you may need to work on in the new year.

Goal

Achieved?

Y

N

Why? Why not?

Goal

Achieved?

Y

N

Why? Why not?

S Heart Forward Self Assessment

Self Assessment -Utilize this tool to help create the roadmap for what you want to accomplish this year. A self assessment is a good way to make you aware of where you are today so that you can develop a strategic plan to arrive to your destination. After completing, review your Maybe's and No's and those should be starting point for goals you can set. For this tool to be useful, you must answer factually and honestly.

Career

	Yes	Maybe	No
1. I enjoy my job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I would do my job at a reduced pay rate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I feel confident taking on new challenges at work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I perform at the highest level in my profession.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. My colleagues respect me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I am happy with my role/title at work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I am a team player.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I consistently get the job done.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I am professionally more valuable this year than last year.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finances

	Yes	Maybe	No
1. I am happy with the amount of money I am currently making.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I am consistently saving on a monthly basis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I have debt under control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I am happy with the assets I have accumulated thus far.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I invest a percentage of my income every month.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

S Heart Forward Self Assessment

Self Assessment

Personal

	Yes	Maybe	No
1. I know my purpose in life.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I am at peace with myself and those around me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I travel often.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I love the area where I live.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I am involved with helping a charity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I make a difference for those around me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I am happy in my relationship with my spouse or significant other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I rarely stress.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I am happy with my weight.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I am full of energy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. I am in good health.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Takeaway Notes: