



WHealthy
Empowerment
Network

Designing Your Life: A Values-Based Approach to Goal Setting

If Not Now
WHEN

"A goal without a plan is just a wish." - Antoine de Saint-Exupéry

At WHealthy Empowerment Network, we believe that true success begins with clarity—and clarity begins with values. When your goals are rooted in what matters most to you, they become more than a checklist. They become a compass.

This worksheet is designed to help you connect your core values—the ones you just identified—to the goals that will shape your life. It's not about hustle or pressure. It's about alignment. It's about action. It's about stepping into the life you want to live with intention and confidence.

Because if not now... WHEN?

What Is a Goal?

A goal is more than an outcome—it's a reflection of the life you want to lead. It's a bridge between what matters to you and how you choose to move through the world.

At WHEN, we define a goal as:

- A values-aligned intention with a purpose and a path
- A commitment to your future self, guided by clarity—not comparison
- A way to translate meaning into momentum

Types of Goals

At WHealthy Empowerment Network, we don't believe in separating life and money. That's why we encourage you to think holistically when setting your goals—because your values touch every part of your life: your health, relationships, time, energy, and yes, your finances.

We break goals into three categories to help you stay focused and take action over time:

Short-Term Goals (Within 1 Year)

Quick wins or important shifts you want to make in the near future. These help build momentum and create space for what matters.

Examples:

- Create or refresh your spending plan
- Build a starter emergency fund
- Set boundaries around work-life balance
- Declutter your home or digital life
- Schedule regular time for movement or rest
- Book a values-aligned trip or retreat

Mid-Term Goals (1–5 Years)

These reflect transitions, aspirations, or evolving priorities. They often require intentional planning or habit-building.

Examples:

- Save for a down payment on a home
- Pay off student loans or consumer debt
- Change careers or go back to school
- Build stronger family routines
- Start therapy or invest in personal growth
- Launch a passion project, side business, or nonprofit initiative

Long-Term Goals (5+ Years)

These are big-picture goals that reflect your vision, legacy, and the life you want to grow into.

Examples:

- Achieve financial independence
- Retire on your own terms
- Fully fund your children's or grandchildren's education
- Leave a legacy of giving or mentorship
- Buy or build your dream home
- Prioritize long-term health and vitality
- Live abroad for a season or explore sabbatical living

Let's Put Your Goals Into Motion

Start with your Top 5–6 Values. Then, imagine what success looks like—on your terms—in each timeframe.

*Values (from previous worksheet)

1. _____
2. _____
3. _____
4. _____
5. _____

Short-Term Goals (Within 1 Year)

1. _____
2. _____
3. _____

Mid-Term Goals (1–5 Years)

1. _____
2. _____
3. _____

Long-Term Goals (5+ Years)

1. _____
2. _____
3. _____

What's one small action you can take today/this week to move forward on any one of these goals?

Because *if not now...* _____