

# Agency Owner Life Plan

Life motto or creed: \_\_\_\_\_  
\_\_\_\_\_

5 legacies I want to leave:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

3 things I'm going to do in the coming year to contribute to those legacies:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This year's mantra (3 words that define my priorities for the year):

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

3 SMART goals for my professional life:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

3 SMART goals for my personal life:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

5 people I want to spend more time with to help me achieve my goals:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_