

GOAL SETTING WEEKEND FOR COUPLES

We hope you enjoy this couples goal-setting retreat schedule and list of thought-provoking questions! We recommend taking two evenings and three days the first time. Ideally this is a relaxing weekend without interruptions from work or family somewhere away from home where you can be 100% focused on each other and the life you want to create together. Reviewing the questions ahead of time will give each partner time to think about the answers before you meet. Feel free to add your own questions!

- Jay and Wendy Papasan

SCHEDULE

Friday Evening: Relaxed evening. Enjoy each other's company over dinner.

Saturday Morning: Review net worth worksheet. Review last year's goals if you have them. Review household budget. Go over questionnaire.

Lunch Break & Exercise (Go for a walk together.)

Saturday Afternoon: Continue to go over the questionnaire. Pay attention! Are there questions or issues that especially matter to both of you? Are there obvious differences in the things that each of you sees as important? Talk through your answers. Begin setting goals. Before you're done time block all vacations for the year.

An alternate two-day schedule is at the bottom of this document.

THOUGHT-PROVOKING QUESTIONS

The questions and categories listed on this questionnaire are not meant to be all-inclusive. Don't try to pinpoint any "right" or "wrong" answers; rather, use this document as a catalogue of ideas to jump-start your goal-setting process and help you understand and appreciate your partner's thoughts and priorities.

Spiritual Questions

What are our priorities for our spiritual life? What steps do we want to take to improve our spiritual life? What are our priorities for our children's spiritual life? What should we tell our children about God? What spiritual rituals do we want to introduce into our family? What are our daily gratitude and other spiritual habits?

Physical Questions

How can we improve our eating habits? What can we do to incorporate exercise into our family activities? Should we join a gym this year? Which athletic or physical activities should our children be involved in? Do we need to lose/gain weight? What should I do to make myself more attractive to my spouse? Are there any athletic goals I want to

pursue (i.e. run a mile--or a marathon)? What can I do to encourage or enable my spouse to meet his/her physical goals?

Individual Personal Questions

Are there any skills or sports I want to learn (i.e., to play the piano, take up golf, speak French, or learn to pick locks?) Are there creative endeavors we want to undertake as a family? Do each of us get enough time to work on ourselves? Do we each have enough "met time" to decompress and destress?

Key Relationship Questions

Marriage

Is our marriage headed in the right direction? Are we growing closer and is the relationship maturing? Are we meeting each other's emotional needs? Are we meeting each other's physical needs? Are we meeting each other's intellectual needs? What kinds of things can we do to ongoing support each other? What do you NEED from me this year? How can we more clearly communicate with each other? Should we go out more often, or make more time for romance? What can we do to improve our sex life? What do we want our marriage to look like five years from now? What do I see as my partner's primary responsibilities in the marriage relationship? What do I see as my primary responsibilities in the marriage relationship?

Children

Do we want children? What are the most important character traits we want to see our children develop? What rules do we want to establish for our children at home and in public? Manners? How should we spend weekends and other leisure time? Does our devotion to our children interfere with or hamper our marriage relationship? Do we support one another in front of our children? What traditions do we want to introduce to our family this year?

Extended Family

What are our relationships with our extended family? Do we need to think about helping aging parents? Brothers or sisters who might need care in the future?

Friendships

If we are the sum of the five people we are closest to, what key relationships do we have and which ones need developing? Are there any specific people we would like to get to know better this year? Should we entertain more? Are there people we should help, befriend, and care for?

Financial Questions

Fill out and review net worth worksheet (See attached).

How do we feel about our financial trajectory? What is our 5-year net worth goal? What are our retirement goals? What will steps do we need to take to move closer to those goals this year? What does our charitable giving look like? Which organizations would we like to target in the coming year? What are our “money we raise” goals for the year? What are our savings goals? How much did we save last year? Was it adequate? What would we like to save for this year? How often should we set money aside, and where should we put it?

Fill out and review household budget (See attached).

Are we spending the right amounts on things like our house, our vacations, clothes, eating out, our cars, etc.? Do we need to start saving for any big ticket items like a car or a house or major household repairs? Do we want to send our children to private school? How much will that cost? Do we need to allocate additional funds for their college education in a 529? What are our real estate savings goals? Do we want to purchase a real estate investment this year? Are we saving enough in our 401k?

Job Questions

How do we like our jobs? Do we feel useful in our work? Are we getting paid enough? How is the commute? What are our individual job aspirations for the year?

Business Questions

How much passive income do we have? How much do we need in 5 years? In 20 years? Do we want to start a business? If so, what kind? How are our businesses doing financially? What are the ultimate goals for the businesses?

Final Questions

What are the key habits we want to develop this year as a family and as individuals?

What books do we want to read as a family and as individuals?

Where do we want to vacation this year? Time block calendar for all vacations.

ALTERNATIVE SCHEDULE – Two Day for first time goal setters.

Friday Evening: Relaxed evening. Enjoy each other’s company over dinner.

Saturday Morning: Review net worth worksheet. Review last year's goals if you have them. Review household budget. Go over questionnaire.

Lunch Break & Exercise (Go for a walk together.)

Saturday Afternoon: Continue to go over the Goal-Setting Questionnaire. Pay attention! Are there questions or issues that especially matter to both of you? Are there obvious differences in the things that each of you sees as important? Talk through your answers. Begin setting goals.

Saturday Evening: Put goal setting on the back burner and let the information "simmer" while we enjoy dinner and relaxing.

Sunday Morning: After breakfast, continue to adjust and refine goals after letting them sit a night. Time block all vacations for the year.