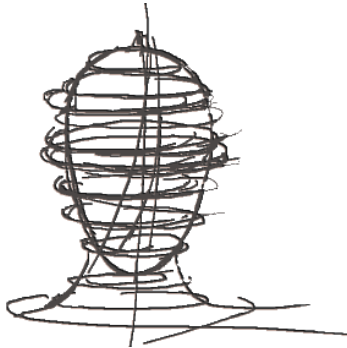




## **LIFE PLANNING**

### **Long Term Plan Goals**

**JOANNA OPTIMAX**





## INSTRUCTIONS

Completing the Long Term Life Plan is a challenging exercise for many people and requires a commitment in time and effort. The more thought you put into your plan the greater the rewards in accomplishing more in your life, doing things that you enjoy, achieving your goals and feeling personally fulfilled.

We recommend that you begin with your **20+ year** plan. Defining your goals for the longer term first, will help you to better determine and align your short term goals. When you finish the **20+ year** goals, move on to the **10 year** plan, then the **3, 2** and finally **1 year plan**.

List all your goals first and then rank them in importance to you. Describe each goal with as much detail as possible. Decide when you will start and when you will finish each goal. Very often it will be possible to specify not only the year but also month and sometimes even the exact date as in the example of an event such as a family reunion or 25th Anniversary.

We suggest you pace yourself with this exercise so you don't get frustrated. Remind yourself that you are making a decision to be proactive in your life and perhaps for the first time. Having clear goals makes it easier to go through obstacle in life, knowing that they are only a temporary delay, not the end of your Life Plan. Having a Life Plan makes it easier to stay on track and if you fall off, to get back on track.

The following information may help guide you with your goals and how to categorize them:

**Professional Goals** – Continuing education, career path steps (job positions), job achievements (e.g. salary level, sales targets), professional status or recognition.

**Personal Goals** – friends, hobbies, fitness, diet, extended education, training courses, financial goals, major purchases such as that special car. (Remember that you need challenges in your life that will maximize the use of your talents and interests and stimulate you).

**Family Goals** – events with: parents, grandparents, brothers, sisters, girlfriend, spouse, kids. Engagement or marriage, family vacations, family trips, family reunions, buying a house, cottage or pool.

Please e-mail back the MS Word document.

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## LONG TERM PLAN

Name: JOANNA OPTIMAX

20+ YEAR PLAN – LIFE GOALS & DREAMS					
	Goals		Description	Start	Finish
<b>Personal Goals</b>	1.	HAPPILY MARRIED	Married with 3 kids with possibility of adopting more later on in life	2013	2019
	2.	TRAVEL AROUND THE WORLD	Visit Peru, Australia & New Zealand, Brazil, Argentina, Chile, France, Italy, Spain, Ireland, Mexico, Portugal, Jamaica, Austria, Venezuela, Russia, Poland, Czech Republic, Switzerland, Netherlands, Belgium, England, Thailand, Tanzania, Kenya and Norway	2010	2028
	3.	BE IN THE GREAT SHAPE	I always want to have time for myself and take care of my health and looks	2009	2028
	4.	BE FLUENT IN FRENCH AND SPANISH	Take additional course to perfect my French and Spanish	2009	2012
	5.	BE INVOLVED WITH HUMANITARIAN ORGANIZATION	I would like to be able to help others, especially kids and volunteer my time and help by involving my family into volunteering actions/events	2009	2028
<b>Professional Goals</b>	1.	GRADUATE FROM RYERSON UNIVERSITY	Graduate with BComm., specialization Hospitality and Tourism Mgmt. minor Human Resources	2009	2009
	2.	FINISH FOUR SEASONS MGMT. TRAINING	Try my best to get this training and request 1 year mgmt. program	2009	2010
	3.	START WORKING AT MAJOR HOTEL CHAIN	Get management position in the hotel where I will be able to move up	2010	2011
	4.	WORK AT DIFFERENT POSITIONS	Try to work in different depart./positions in order to get to the top and be in charge of the entire hotel	2011	2015
	5.	BE IN CHARGE OF FEW HOTELS	Try to be in charge of several hotels	2015	2028
<b>Family Goals</b>	1.	STAY CLOSE AND IN TOUCH WITH MY FAMILY	No matter where my life takes me, I want to stay close to my brother and my parents	2009	2028
	2.	HELP MY PARENTS TO SAVE MONEY FOR APT,	My parents dream of getting small apartment in Belgrade, Serbia. I want to help them financially to get it.	2012	2015
	3.	MOVE OUT AND HAVE MY OWN FAMILY	I would like to have my own apartment and have family of my own. I would like my parents to help me in raising my kids.	2011	2028
	4.	MAKE TIME FOR IMPORTANT FAM. EVENTS	Birthdays, My parents 25 <sup>th</sup> anniversary, wedding, graduation	2009	2028
	5.	HELP MY FAM. PERSUE THEIR GOALS AND DREAMS	Support and help my parents, brother husband, kids and other family members to achieve their goals and dreams.	2009	2028



## LONG TERM PLAN

Name: JOANNA OPTIMAX

10 YEAR PLAN – GOALS 2018					
	Goals	Description	Start	Finish	
<b>Personal Goals</b>	1.	GET MARRIED	Hopefully I will find my loving husband by then and get married ☺	2012	2013
	2.	GIVE BIRTH TO THREE KIDS	I will give a birth to 3 beautiful babies	2013	2017
	3.	TRAVEL	Have one vacation alone with my husband and one including my kids and extended family ( 2 per year)	2013	2017
	4.	SPEAK FRENCH AND SPANISH FLUENTLY	Take courses and be fluent in both languages by 2010.	2009	2010
	5.	HEALTH&BODY	I want to always make time for myself and workout on regular basis	2009	2017
<b>Professional Goals</b>	1.	GET DEGREE IN BCOMM	Finish Ryerson with HR minor	2009	2009
	2.	TAKE COURSES AND TRAINING	Take any courses/training/seminars that would help me move up faster in my career	2009	2019
	3.	FINISH ANY MGMT TRAINING PROGRAM	Apply for this mgmt program in 2010	2010	2012
	4.	GET EXPERIENCE IN DIFFERENT FIELDS/DEPARTMENTS	Since mgmt of the hotel requires knowledge in different fields. I want to build my resume and learn through different job experiences	2009	2019
	5.	OWN A CAR	In order to have more flexibility at work I need my own car	2010	2019
<b>Family Goals</b>	1.	GET APPARTMENT IN BELGRADE, SERBIA	Help my mom, dad and brother get an apartment in Belgrade, Serbia	2011	2015
	2.	HELP MY PARENTS	Help my parents financially so that they don't have to work too much	2010	2019
	3.	BAPTIZE MY CHILDREN	I want all my kids to be baptized in the Orthodox Serbian Church	2013	2019
	4.	LANGUAGE IN THE HOUSE	I want my kids to be fluent in Serbian and English	2013	2019
	5.	VISITING THE REST OF THE FAMILY	I want my kids to visit the rest of mine and my husband's family and learn more about other family members	2013	2019



## LONG TERM PLAN

Name: JOANNA OPTIMAX

3 YEAR PLAN – GOALS 2011					
	Goals		Description	Start	Finish
<b>Personal Goals</b>	1.	STAY IN SHAPE	I want to find time to workout 3-4 times per week	2009	2012
	2.	USE MY VACATION TIME TO VISIT AT LEAST 5 NEW CITIES/COUNTRIES	I would like to visit new country/place almost every time that I travel	2009	2012
	3.	RETURN ALL THE MONEY ON MY CREDIT CARDS	I would like to have no balance on my credit card by the end of the 2008	2009	2011
	4.	MOVE OUT ON MY OWN	I would like to do that by the end of the 2010	2012	2012
	5.	PARTICIPATE IN CHARITY ORG./EVENT	I would like to help out charities and kids that need help	2009	2012
<b>Professional Goals</b>	1.	GRADUATE FROM RYERSON UNIVERSITY	Graduate in Spring 2011 With HR minor	2009	2011
	2.	GET DRIVING LICENCE	Start driving school and pass G test before spring 2011	2009	2011
	3.	DO MGMT TRAINING PROGRAM	Try to get mgmt training trough my f/d manager –in Dubai or through Four Seasons mgmt program	2009	2010
	4.	BECOME FLUENT IN FRENCH AND SPANISH	Take courses and visit countries which will help me be fluent in both	2009	2012
	5.	START WORKING AT MGMT POSITION	After mgmt training I would like to find well paid mgmt position	2010	2012
<b>Family Goals</b>	1.	MOVE TO ANOTHER APARTMENT	Help my parents move to another apartment in Mississauga	2009	2010
	2.	FAMILY TIME	Spend more time at home and talk to my brother and parents more-example organize 'family movie nights'	2009	2012
	3.	START PAYING MY OWN HEALTH INSURANCE	I want to start paying for my own insurance instead of my parents	2009	2012
	4.	FAMILY MINI VACATION	I would like to have one weekend when my parents, my brother and I will go somewhere together and spend day/ two together-at least once a year	2009	2012
	5.	FOOD AND EXERCISE FOR MY PARENTS	I want to help out my parents to exercise more and eat healthier	2009	2012



## LONG TERM PLAN

Name: JOANNA OPTIMAX

2 YEAR PLAN – GOALS 2010					
	Goals		Description	Start	Finish
<b>Personal Goals</b>	1.	VISIT DOCTOR	I want to go to a regular doctor/dentist check up visits- twice a year	2009	2011
	2.	WORKOUTS	I want to join the gym and workout three/four times a week	2009	2011
	3.	LANGUAGES	Pick other language and become fluent by the end of the 2011	2010	2011
	4.	CHARITY	Participate in at least one charity event per year	2009	2011
	5.	WEIGHT	Keep the same weight as in the year 1- 73 kg	2010	2011
<b>Professional Goals</b>	1.	COMPLETE RYERSON	Graduate from Ryerson	2009	2009
	2.	COMPLETE MGMT TRAINING PROGRAM	Complete at least 6 month preferably 1 year mgmt training program	2009	2011
	3.	PAY OFF MY OSAP	In first two year I want to pay off my OSAP debt- 10, 000	2009	2011
	4.	OWN A CAR	I want to buy a used car after I finish with my mgmt training program	2010	2011
	5.	GET FIRST AID CERTIFICATE	I want to get first aid certificate	2010	2011
<b>Family Goals</b>	1.	MY PARENTS VACATION	I want my dad and my mom to go on a vacation bc they haven't been anywhere in years	2009	2011
	2.	NEW APPARTMENT	Help m family find and move to another apartment in Mississauga	2009	2011
	3.	FAMILY FROM SERBIA	Remain in touch with all my family/friends members from back home –establish one day a week to call/contact them on a regular basis	2009	2011
	4.	HOUSE WORK	Learn to cook and start doing my own laundry	2009	2011
	5.	FINANCE	Help my parents financially as much as I can so that they don't have to work as much	2010	2011



## LONG TERM PLAN

Name: JOANNA OPTIMAX

1 YEAR PLAN – GOALS 2009					
	Goals		Description	Start	Finish
<b>Personal Goals</b>	1.	HEALTH	Visit doctors/dentist twice a year for checkups	2009	2010
	2.	WORKOUTS	Continue working out/exercising after my volleyball career at Ryerson is done (play beach vball/join alumni vball team)	March 2009	Dec. 2009
	3.	WEIGHT	I want to lose weight –goal: 73kg until beginning of the summer	Jan. 2009	June 2009
	4.	SPANISH/FRENCH	Be fluent in French or Spanish by the end of the year 2009	2009	2010
	5.	BETTER SOCIAL LIFE	I want to spend more time out with my friends, coworkers, team mates and less on the phone and internet	Jan. 2009	Dec. 28, 06 2009
<b>Professional Goals</b>	1.	GRADUATE FROM RYERSON	Bachelor of Commerce with HR minor-specialization Hospitality and Tourism Mgmt.	2004	May of 2009
	2.	APPLY FOR MGMT TRAINING PROGRAMS	Apply for Dubai program and if that doesn't work out then Four Seasons program	Jan. of 2009	Nov. of 2009
	3.	GET G2 LICENCE	Take driving classes and pass G2 test	August 2009	Sept. 2009
	4.	WORK WITH DIG DEEP COMPANY	I would work as administrator for Dig Deep. This experience will help me gain more skills that are necessary for my future career –building my resume	Jan. of 2009	Dec. of 2009
	5.	FINISH VOLONTEERING	Continue volunteering at SHTM placement center until the end of school year 2007-building my resume	Jan. of 2009	April 2009
<b>Family Goals</b>	1.	NEW APPARTMENT	Help my parents find and move after my graduation ( in the Mississauga area)	May 2009	Sept. 2009
	2.	25 MARRIAGE ANNIVERSARY	Buy my parents nice gift for 25 yr. marriage anniversary	Feb. 2009	Feb. 2009
	3.	VISIT FAMILY	Visit my family and friends this summer in Sweden, Serbia and Croatia	June 2009	August 2009
	4.	STAY IN TOUCH	Pick one day a week when I will call/write to my family and friends from Serbia, Sweden and Croatia	2009	2010
	5.	HOUSE WORK	Start cooking and doing my laundry	2009	2010