

The year is drawing to a close (already...) and it's time for our next trip around the sun.

A favorite things to do at this time of year is set aside time to reflect on the year gone by and plan for the year ahead. Each year around this time, we do a personal end-of-year review. Below is a template that can be used to guide the process and be easily adapted to suit your particular situation and preferences.

Start your personal end-of-year review by reflecting on the different areas of life

These are:

- Job/career
- Health and fitness
- Finances
- Family
- Romance/dating
- Friendships
- Fun and leisure
- Home/physical environment
- Personal growth and development

For each area, answer the following questions:

Area of Life: Job / Career

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Health and Fitness

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Finances

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Family

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Friendships

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Fun and Recreation

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Home Environment

What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Area of Life: Personal Growth and Development	
What worked this year?	
What is still a work in progress in this area?	
What are the wins from this area of life over the past year?	
What are the mishaps?	
Where are the gaps between what I'm saying I want in this area of life and how I'm actually living it?	
How do I feel about each area when I think about the past year?	
How do I want to feel about each area this time next year?	
Who do I want to be in this area of my life over the next year? What qualities do I want to embody?	

Choose 3 of the above areas to focus on over the next six months.

- *What do I need to learn? Are there any knowledge gaps I need to address to take these steps?*
 - *Area 1:*

 - *Area 2:*

 - *Area 3:*

- *Who could be useful for support/guidance? Who do I know who is already rocking these areas of life? And how might they be able to support me?*
 - *Area 1:*

 - *Area 2:*

 - *Area 3:*

Note: these don't have to be people you know personally, they can be people whose books you read, people who model who you'd like to become and how you'd like to show up in the world, and public figures you admire.

- *What do I think are likely to be my three biggest obstacles as I take these steps?*
 - 1.

 - 2.

 - 3.

- *What can I do in other areas of my life to support these steps?*

For example, let's say improving your health and fitness is a goal and going to the gym three times a week is one of the tangible steps. A complementary habit might be making sure you go to bed by a certain time so you can get up early to work out.

- *Who do I need to become to live this vision? What qualities will that version of myself embody?*

Create your roadmap

This is an important part of the personal end-of-year review that we often miss out on. Decide now when and how often you will take those tangible steps and schedule them into your calendar. Here are two suggestions to help:

- **Focus on making this sustainable.**
 - Using the gym example above, going from zero visits per week straight up to five visits per week is unlikely to last. Start with one or two visits and build up from there. Remember: there is no rush and diving into extremes is often a not-so-subtle form of self-sabotage. Make it as easy as possible for yourself to succeed.
- **Focus on one change at a time.**
 - This is also about giving yourself the best chance of success. Once the first change has become your new "normal," then you can move on to something else. Trying to change all three areas of your life at once and in one go will likely overwhelm and hinder your progress more than it will help.

Let go of your vision

Having created a vision in part 2, we now invite you to let go of it.

Why?

Because the only thing you can control is the process and your input, not the outcome. Your vision is also likely to change as you make progress. As important as qualities like consistency and tenacity are, we also need to be able to let go of plans and goals that are no longer relevant. The only thing you need to focus on at any given time is the next tangible step.

This is just one way to do a personal end-of-year review. Other suggestions and templates you can use include:

- Choosing a theme or word for the year ahead (Susannah Conway has created an excellent guide to this process [here](#))
- Desire mapping