



Organize, Communicate, Prepare

Developing SMART Goals

Most of us need a plan to achieve our wishes. A legal plan of action starts with goals. If you set “SMART” goals you’ll have a roadmap to achieve the legal actions that are important to you and your family.

SMART legal goals have several important criteria.

S	Should be SPECIFIC with dates, resources, and dollar amounts needed to accomplish the goal.
M	Should be MEASUREABLE . Determine weekly or monthly dates and dollar amounts to accomplish goals. MUTUAL is another word to consider. Legal goals that are shared with your spouse, partner, and family members will be easier to achieve. It is important to think about how you’ll keep yourself MOTIVATED to achieve the goals.
A	Your goals should be ATTAINABLE for your situation. Maybe you will be able to complete part of the goal now.
R	If your goals are REALISTIC and RELEVANT to your life they will be easier to achieve. Identify the RESOURCES needed to achieve your goals. It is also important to REVIEW and REVISE your goals when necessary.
T	You’ll need a specific TIMELINE to accomplish your goals. Since there’s never enough time to complete all your goals immediately, you need to prioritize your goals.

When you first think of all the legal tasks to be accomplished, you may feel overwhelmed. One way to achieve your goals is to break up the tasks into chunks. Set short-term (complete in less than 3 months), intermediate-term (complete in 3 to 6 months), and long-term goals (complete in a year or more).

For example, a short-term legal goal might be to write to the appropriate agency to obtain an important missing document by the end of this week. To make the goal more specific, indicate the name of the paper and the agency you will contact. Another short-term goal might be to video or take photographs of your household property by next weekend. To make this goal more specific and measurable, list the rooms you will photograph and the weekend date. On the following weekend, you will write the brand, serial number, and purchase price of the electronic products in your house (television, VCR, computer, etc.) on a household inventory list. If you can’t find purchase prices in your records, read newspaper classified advertisements or check the Internet for the value electronic gear that is similar in age and features to yours. Record that information on your household inventory list.

An intermediate goal could be to get names of attorneys who specialize in wills and estate planning. To make this goal specific, list the resources you will use to obtain attorney’s names, addresses, and phone numbers. Set a deadline date, such as “within 3 months.” Another intermediate goal might be to complete forms for a living will and durable power of attorney for

health care within 5 months. To make this goal more specific/measurable, list where you will obtain the forms and a deadline date, such as “by June 1.”

An example of a long-term goal might be to determine if establishing a trust will benefit you and your heirs. Make it specific by setting a deadline date. If you set short- or intermediate-term goals of learning about trusts, their advantages and disadvantages, and costs, your trust goal will be easier to accomplish.

In the chart on the next page, start your goal list.

Put your plan into action. Remind yourself of your goals often. That’s one reason for having written goals. To stay motivated, visualize the reduced worries, problems, and time that your family will have as a result of your goals being accomplished. Frequently evaluate your progress toward reaching your goals and make changes as needed. Once you achieve a goal, move on to the next one.

With motivation, commitment, and discipline, you can achieve your dreams and take control of your legal future.

Adapted for use in the *Legally Secure Your Financial Future* program
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Legal Goal Setting Worksheet

Goals	Rank (top priority is # 1)	Approximate cost (if any) or Resources needed	Start date	Completion date
Short-term (less than 3 months)				
Intermediate-term (3 to 6 months)				
Long-term (a year or more)				

Date prepared ____/____/____ For (name) _____