Examples of Attendee Visions, Goals and Mission Statements:

"I am very excited to have a worry-free retirement investment portfolio that:
1) Consistently generates a minimum monthly income of $5000, and
2) Grows my principal at a minimum of $10,000/mo."

Retirement Vision Statement Draft:
(Picture on the front of the puzzle box to guide me.)
Be smart enough to grow our hard earned dollars into a legacy that allows us to give and to live in a manner that is keeping with our values and is profitable beyond needs.
Goals Draft:
(Mileposts you need to pass in order to achieve your vision.)

Goal 1: To be smart enough
   Strategy 1: Take VectorVest 30-day Retirement Transformation Course seriously
   Strategy 2: Learn Covered Calls and Selling Puts - paper trade until profitable
   Strategy 3: Develop a focused trading plan that is useful and keeps me to task
   Strategy 4: Learn Strategies of the Weeks for conservative to swing trading targeted accounts
   Strategy 5: Attend week-long training at VectorVest
   Strategy 6: Join VectorVest online groups; attend local meetings

Goal 2: Leave a legacy for three daughters. Make it a game changer for them through learning!

Goal 3: Give and give some more. Make it a game changer for targeted individuals and organizations in alignment with our values! (We’ve got this going already; not comfortable making details public.)

Goal 3: Profitable beyond needs
   Strategy 1: Through conservative approaches outlined in trading plan, earn 2%+ a month.
   Strategy 2: Use VectorVest to identify low risk, high probability trades
   Strategy 3: Treat it as a business; transform my mindset by reading; start with Dr. Elder’s book
   Strategy 4: Develop a business plan

"Create financial independence in order to support my desired lifestyle and enable me to focus on those activities meaningful to me."
We are going to achieve absolute financial freedom and security by keeping our investments boring and the rest of my life fun and exciting; to become the best husband, father and physician or GROW INCOME FOR LIFE

My Goals

1. Start consolidating all financial accounts from various Banks and Brokerage Houses (finish 1 Mo.)

2. Pick financial planning services that can service 50% of assets, rest invest by myself (finish in 3 Mo.)

3. Choose financial planning service who can show their investment return around 10% (3 Mo)

4. My personal assets to be invested using VectorVest’s strategies of retirement services (after 1 Mo.)

5. Consider moving to a retirement community, evaluate cost of living (finish in 1 year)

6. Prepare current home for putting for sale, select Agent to handle the sale (finish in 2 years)

7. At least once each year, travel one country abroad, and go one city within US (continue each year)

8. Review investment results (each quarter), develop method to do better in the future.

9. Attend seminars/study constantly to learn new techniques to improve ways to enjoy retirement.

"My objective in retirement is to maintain my current standard of living and to golf at least twice per week".
"Preserve existing resources for the benefit of myself and my heirs, while providing a consistent level of annual income."

Still putting numbers on my investment goals using Brian's worksheet. However, here are goals as currently structured.

1.) Budget total living expenses to $50,000/year.

2.) Spend a minimum of 30 minutes per day, 6 days a week, evaluating investment goal achievement.

3.) Have a plan

4.) Leave emotion at the door. Stick to the plan

I wish to pursue my interests and passions with open-mindedness, flexibility and even whimsy; I wish to devote time and attention to relationships with family and friends, especially my grandchildren; I wish to remain acutely aware of world, national and local events and participate and volunteer as I deem appropriate, and finally, I wish to continue to pursue a lifestyle that preserves a healthy mind, body and spirit.

I will enjoy life and make investment profits that are 3 times or more than my losses and create a 'No Worry' future that allows me to sleep like a baby and have 1 Million $ or more left over when I die.

Goal:

1. I will earn 20% per year or more on my investments by creating a solid plan and following it.
I am developing a strategy that is giving me the knowledge, systems, and procedures for producing lifelong investable assets, resulting in exciting, yet secure, retirement living.

My desire has always been, learn the basics of anything new, then build on it one step at a time.

Maintain my healthy existence with constant capital preservation.

Identify the pros and cons of being able to go forward, using the knowledge that Vector Vest has experienced, over the decades of accomplishment.

Now that I am retired, my vision is to pursue my dream of maintaining an active life-style, keeping my body and mind in good health, achieving financially independence by following prudent strategies, traveling to exotic countries of the world to interact and understand their culture, learning and sharing happiness with my family and friends, and be a contributing member of society to the very end.

Money comes easily and frequently by trading as VV has taught following the rules correctly and completely each and every day.

Goals:

My goal is to trade only high probability trades as confirmed by my trading plan entries, exits and money management, which will produce a 30% annual rate of return.

I will only take trades in a confirmed uptrend environment.
I will only trade the best of the best VV stock view stocks. I will be focused, patient and disciplined. I will review my trades to see if rules were followed on entries, exits, money management after each and every trade and enter results on spreadsheet. At the end of every month, I will review my account to see if I have stayed within the guidelines. Did I have a profit target of at least 10% per winning trade? Did I do 3 trades per month? Did I do 67% winning trades? Did I stick to my stop? Did I stick to my profit target?

"Increase my portfolio assets through careful, deliberate, and strategic investments."

To maintain my retirement lifestyle, I am creating a well-balanced portfolio that protects my retirement money and increases its value.

To safely replace monthly income lost after retiring by conservatively investing funds and retirement income in safe undervalued stocks and options.

To maximize annual profits minimizing drawdown. I will follow a safe, conservative trading approach, primarily based on technical analysis including Support and Resistance, Trend Lines and moving averages. I will use Investor’s Business Daily and Vector Vest market timing methods to identify the market direction, i.e., “Confirmed Up” or “A/B” for up-trending markets and “Confirmed Down” or “D/E” for down-trending markets. I will trade stocks using long
strategies during up-trending markets and short strategies during down-trending markets.

I will design and develop a trading plan that will be entirely rule-based, so that I can systematically back-test the plan on historical data, where applicable, using the VectorVest back test capabilities. I will also utilize technical analysis, support, resistance, gaps, earnings announcements and trend lines to enter trades. Once I am satisfied with my performance requirements in back-testing mode, I will paper trade the system for at least 15 trades. If the system performs in a satisfactory manner (i.e., the plan is on target to achieve my profit goals and keeping my risk controlled), I will begin trading with real money.

My trading plan will include the following key elements;

- Market Timing
- Business Sector and Industry Group Timing
- Money and Risk Management
- Stock Screening
- Stock Selection
- Stock Entries
- Stock Exists

I will conduct my trading as a business and trade in a safe disciplined manner, strictly following my Trading Plan rules. I will document my trading performance for review, evaluation and improvement. For every individual trade, I will record information on entry, exit and performance. I will maintain a cumulative record of my trades, including the number of trades, total profits and losses, rate of return as well as maximum portfolio draw-down.

I also consider this plan a living document. Therefore, I will update my rules as needed, based on actual performance and lessons learned. In addition, I will continue to learn as much as possible, through reading books, magazines,
attending educational courses, coaching and conferences. I will be open to new trading ideas obtained from these sources and will rigorously back-test and paper trade promising ideas for potential incorporation into my overall trading plan.

- To earn a minimum of $5,000 per month trading stocks and options to supplement retirement income.
- To safely trade undervalued stocks utilizing VectorVest and Investor’s Business Daily.
- To set specific entry and exit targets on all trades.
- To invest in long strategies in confirmed-up markets and short strategies in confirmed-down markets.

Vision Statement – Retire in 2026 with ability to generate income of $300,000 per year on a capital base of over $3 million.

Goals – Engage $250,000 in a growth portfolio with the goal to double this capital base every 3 years (assuming a 24% annual return with all funds reinvested)

To earn enough money in the market to prevent my net assets from declining each year (and allow us to continue in the life style to which we were accustomed).

The Goal was: To earn a minimum of 20% (of liquid assets) each year.

The Action Plan was: To use VectorVest tools for primary analysis and E*TRADE tools to buy and sell.
I envision surviving comfortably throughout my retirement years and retain financial independence through income generation, wealth growth and preservation. We are living more simply and economically as I have researched this for some time - we continue debt free, most of our travel is within the country, we spend more time with our family and plan to leave the retained principal in our investments to our nieces, nephews and god-children. VectorVest investing is my main vehicle for the establishment of this vision. I have just retired from salaried work (and previous businesses) and this is my new career. At this time this business will be a sole proprietorship.

Goals Checklist

Yes / No

1. I know exactly when I am going to retire – I retired July 4th, 2014 - Yes
2. I know my savings and investment totals - Yes
3. I know where I will retire and associated cost of living - Yes
4. I know what my retirement income will be and how it compares to my current income - Yes
5. I know both my current and projected level of debt - Yes
6. I know the proper way to draw income from my retirement accounts - Yes
7. I know how to minimize effects of taxes and inflation - Yes
8. I know my health outlook and am prepared for a potential long term concern - In Process and No

Vision Statement:

Take care of my family (wife and 2 kids) and afford everyone the luxury to follow their passions/interests.

Goals:

1) My wife and I will retire at 55

2) Generate $50K of annual income for each year of retirement until the age of 90 (35 years)