

# Annual Reflection & Setup Year Template

*A grounded, honest way to look back on your year, not just by numbers, but by growth, confusion, and direction.*

This isn't about making your year sound impressive. It's about telling the truth.

Some years are **breakthrough years**. Some years are **setup years**. Most are messy, unclear, and uncomfortable.

Use this template to reflect, reset, and move forward with years to look back upon. Write like you're talking to yourself, not an audience.

## YEAR OVERVIEW

Year: \_\_\_\_\_

**How would you describe this year in one sentence?**

*Example: "Not bad. Not great. Just confusing as hell."*

**What did you think this year would look like... and how wrong were you?**

Talk about the expectations you had at the start of the year vs. what actually happened.

*Example: "If you asked me at the end of 2024 what 2025 was going to look like, I would've been completely wrong. I thought I had a direction. I thought I knew what I was building toward. And then the year started, and almost immediately, that picture fell apart."*

**What theme defined this year?**

Choose a word or phrase.

*Examples: Setup year, Pivot year, Humbling year, Foundation year, Growth year*

## **BUSINESS / CAREER**

### **What direction did your career take this year?**

Describe what changed, what surprised you, and what you leaned into.

*Example: "I pivoted into a new industry and realized how difficult the journey to acquiring clients will be."*

### **Biggest wins (even if they don't look big yet):**

*Example: Getting licensed, joining a higher performing team, showing up consistently.*

### **Biggest challenges:**

Be honest, this is where the growth usually lives.

*Example: Lack of experience, slow momentum, self doubt, financial pressure.*

### **What did this year teach you?**

## **FINANCES**

### **How did money really feel this year?**

Not numbers, emotions.

*Example: "Stressful, tight, uncertain, but survivable."*

### **What did you do to stay afloat?**

List it without judgment.

*Example: Side work, borrowing, asking for help, downsizing, sacrificing comfort.*

### **What would financial stability look like next year?**

Be specific but realistic.

## **FRIENDS & SOCIAL LIFE**

**How did your relationship with friends change?**

*Example: "I became more selective with my time and stopped trying to be everywhere."*

**Who felt energizing vs. draining?**

You don't need to name everyone, just notice the pattern.

**What boundaries did you learn you need?**

## **FAMILY**

**How present were you with family this year?**

**In what ways did they support you?**

*Example: Time, space, emotional backing, practical help.*

**How do you want to show up for them next year?**

## **RELATIONSHIP**

**If you could go back to the first day you met... would you choose this again?**

Why or why not?

**What felt strong?**

**What still feels unresolved?**

Be honest without being harsh.

**How was your experience throughout the year (most memorable moments)?**

## **TRAVEL & LIFE EXPERIENCES**

**Where did you go this year?**

List them.

**What moments made you feel alive?**

*Example: "A random drive, a shared laugh, a quiet moment that reminded me why I'm doing all this."*

**What do you want travel to represent in your life and what does that look like financially?**

**How many times would you like to travel next year?**

## **HEALTH, FITNESS & SELF-CARE**

**What habits stuck?**

**What habits slipped?**

**How did your body feel most of the year?**

*Example: Energized, depleted, anxious, strong, inconsistent.*

**What does "taking care of yourself" actually mean next year?**

## **SKILLS & PERSONAL GROWTH**

**What skills did you intentionally work on?**

*Examples: Communication, public speaking, discipline, leadership, consistency.*

**What skills do you want to double down on?**

## **CATEGORY PRIORITIES**

Rank what truly matters going forward (1 = most important):

1.

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2.

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3.

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4.

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5.

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*Example categories: Health, Family, Business, Finances, Friends, Travel, Skills.*

## **GOALS — NEXT YEAR**

**Non-Negotiables (habits you commit to):**

**Professional / Financial Goals:**

**Personal / Relationship Goals:**

**Experiences You Want to Create:**

## FINAL REFLECTION

**What are you proud of, even if no one else sees it?**

**What are you letting go of?**

**What are you trusting will work itself out?**

*Reminder: Not every year is about results. Some years are about roots growing underground.*

### **Closing Thought**

This year didn't need to make sense. It needed to happen.

You're allowed to be proud **and** uncertain at the same time. That usually means you're exactly where you're supposed to be.