

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.

2.

3.

4.

5.

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.