



DEFINING YOUR GOALS IN MED SCHOOL

Stop and reflect on what you actually want to achieve! You may be at the early stages of your studies, but deciding on what you want and start planning early is key to success.

1. Personal goals

Project yourself passed this year, what do you want to achieve on a personal level.

Within the next 2 years

(e.g. Pass exams, move out of parents house, go overseas for an elective...)

Goal:

Goal:

Within the next 5 years

(e.g. buy an investment property, get to Coachella in 2024...)

Goal:

Goal:

Goal:

2. Financial goals

As you enter the workforce, you will start earning an income - and have bills.

Put down your known expenses and outgoings

Got a lot of blanks? Not to worry, we can help you figure this in your no-obligation initial consultation.

Ins

Part-time wage

Centrelink allowances

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Outs

Rent/Mortgage \$

Essentials (e.g. food) \$

Bills \$

Credit cards/loans \$

Lifestyle \$

Other \$

3. Self-assessment

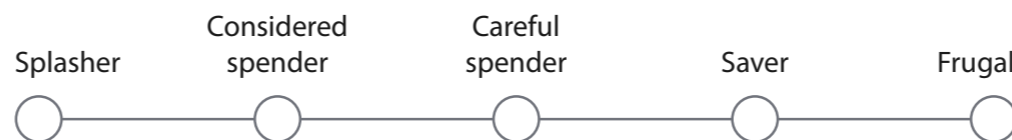
On a scale of 1 to 5, where you would rate your financial literacy?

(e.g. understanding of taxation rules, knowledge of basic investment market, different insurances...)

1 2 3 4 5

What kind of consumer are you?

(e.g. understanding of taxation rules, knowledge of basic investment market, different insurances...)



4. Your goals

Now that you've gone through the exercise of assessing your finances, go back to your personal goals and pick 3 of them that you can put things in motion for right now.

Goal:

Action:

Goal:

Action:

Goal:

Action:

How will you keep yourself accountable?

(e.g. ask a friend or a parent to check in with me every quarter to see how I'm tracking)

1.

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2.

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3. Book your complimentary tax return with DPM to set yourself up and achieve your goals.

Visualize

Save \$ for short-term goal

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Save \$ for long-term goal

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Put aside \$ for investments/safety net

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Check out those articles that can help you with achieving your goals

Investing for beginners 101

Medical students, save time and avoid errors on your tax returns

5 benefits of having a part-time job while studying medicine

The importance of Mindfulness for medical students

How to avoid burnout | managing life flow

Choosing a Super Fund

What you need to consider before you start renting a house

Medical degree – Life after graduation

Top 5 tips for Salary Packaging in your intern year

8 tips to help you smash University

Tips to survive and thrive during your internship year

How to prepare for and maximise your year as an intern