

Q1 2026 Dashboard (Jan-Mar)

Top 3 Quarterly Objectives

1. **Career:** Successfully onboard at Amtech, establish a strategic territory plan, and book the first 5 discovery meetings.
 2. **Financial:** Open a 529 plan for Charlotte and automate savings from every paycheck.
 3. **Wellness:** Achieve 85% consistency with the new workout and daily Huberman protocols.
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Key Weekly Actions

Career

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Tier all accounts using the “Fruitful Territory Framework.”

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Conduct outreach to all “Priority 1” accounts.

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Practice the “Buyer Approved Discovery Blueprint” before calls.

Financial

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Research and select the best 529 plan for your state.

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Set up an automatic transfer to a high-yield savings account.

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Analyze Monarch Money data for one non-essential spending category to reduce.

Health & Wellness

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Complete 3-4 workouts (alternating Workout A/B).

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Get 10-15 minutes of morning sunlight daily.

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Take a 15-minute post-workout walk with Goose.

Personal Growth & Family

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Schedule and complete two 30-minute “thinking walks.”

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Hold one 30-minute “intentional learning” session.

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Practice a 10-minute NSDR protocol twice.

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Plan one date night with Sami.

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Read to Charlotte every night.

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Hold one “unplugged” family hour on the weekend.