

2026

Property Goals Planner

A simple way to get clear, stay focused,
and make real progress this year.



PropertyHub

SECTION 1: WELCOME



Welcome to Your 2026 Planner

2026 is full of opportunity, but it's what you do with it that matters.

This planner will help you reflect, set clear goals, and make confident moves toward the property portfolio you want.

We'll check in each quarter to keep you accountable, share updates from the market, and help you stay on track.

Here's to making 2026 your best year in property yet!

A quick look back at 2025

Look back with clarity, move forward with confidence

Before you start planning for 2026, take a moment to look at the year you've just had. Every success and every challenge will help shape better decisions going forward. This is about learning, not criticising, and it's a great way to start the year feeling grounded.

Quick prompts

Use these to get clear on what last year taught you:

- What went well in 2025?
- What didn't go to plan, and what did you learn from it?
- What's your proudest property moment from the year?
- What do you want to avoid repeating in 2026?



Where you're starting from

Before you start mapping out the year ahead, it helps to get a quick sense of where you're beginning from.

There's no "right" box to tick here – every investor starts somewhere different, and the whole point of this planner is to meet you exactly where you are.

Tick anything that applies, to simply give you a clearer picture of your starting point:

I'm brand new and exploring investing

I'm researching my first deal

I'm planning to buy a property this year

I already own one or more properties

I'm reviewing or refinancing

I'm looking to grow or diversify



If you're just getting started, we've got a video that boils everything down to the basics, so you can get a feel for things without disappearing down a rabbit hole. **Watch here.**



And if you're lining up your first deal, we've also covered the classic mistakes investors tend to make at the beginning. It's a quick, helpful way to sidestep the usual trip-ups. **Watch here.**

Set your 2026 property goals

Give your year a clear direction

Take a moment to think about what you really want from the year ahead. Clear goals make every decision easier - they give you focus, stop you getting pulled off track, and help you measure progress in a way that actually feels meaningful.

Setting goals isn't about creating a huge list or being wildly ambitious.

The best goals are the ones where you're crystal-clear on two things:

What you want, and

Why you want it.

When you know those two, making decisions and sticking with them becomes a lot easier. So, use this section to get specific. Picture the you of December 2026 looking back... what would they be proud of?



SECTION 4: SET YOUR 2026 PROPERTY GOALS

What's your **main property goal** for 2026? (e.g. buy first property, expand portfolio, refinance, boost cashflow):

Why is this important to you?:

What would "success" look like in December 2026?

Any financial targets? Cashflow, ROI, savings, whatever's relevant.

What could stop you achieving it? and how you'll handle it:

SECTION 4: SET YOUR 2026 PROPERTY GOALS

Goal	Why it matters	Deadline	Confidence (1–10)

Build your plan

Here's where ideas become a plan

A goal on its own is nice, but a plan is what actually gets you there. The aim here isn't to map out every detail - just enough structure so you always know your next step.

Think of it as giving future you fewer excuses.

My strategy this year is: Buy-to-let | BRR | Refinance | Diversify | Hands-off

My preferred locations are:

I'll review my finances and borrowing position by:

Professionals I'll speak to (and why): Broker | Accountant | Property Hub
Invest | Tax Adviser

I'll check in on this plan: Monthly | Quarterly | As needed

Quick Checklist: The things that move you forward

These are the things that make the biggest difference early on.

Tick them off as you go - they'll keep you on track and stop you getting bogged down.

I've checked what I can borrow

Speaking to a broker early stops you guessing and gives you a realistic starting point.

I've decided what kind of property I'm going for

New-build? Refurb? Apartment? House? Knowing this upfront makes everything quicker – and stops you getting distracted by deals that aren't right for you.

I've picked 1–3 locations to concentrate on

Narrowing your focus avoids overwhelm and makes it easier to understand what really matters in an area..

I've set aside (or committed to saving) my investment pot

Knowing the numbers helps everything else fall into place.

I've spoken to a tax adviser or accountant

Not glamorous, but it avoids costly surprises and helps you structure things properly.

I've booked a call with the Property Hub Invest team (if I want help finding deals)

We can walk you through opportunities that fit your goals, budget and timeline – and save you hours of scrolling, guessing, and wondering if you're missing something better.

Your 2026 Action Roadmap

Small steps. Steady progress. One solid year.

Property rewards the people who turn up consistently - not the ones who sprint for a month then disappear. These quarterly checkpoints keep you grounded, accountable, and moving.

Right Now (Q1): Get moving

Review finances • Talk to a broker • Start deal flow • View properties • Make offers

Spring (Q2): Build momentum

Progress purchases • Keep deal flow strong
Solidify your portfolio plan

Summer / Autumn (Q3): Optimise

Review performance • Consider refinancing
Improve cashflow or efficiency

Year-End (Q4): Reflect & Reset

Capture your results • Note lessons
Start shaping 2027's goals

Mindset & Accountability

A few things that make a big difference

We've seen hundreds of investors over the years, and the ones who get the best results aren't the fast movers - they're the consistent ones. The ones who check in with themselves, keep learning, and don't panic when the market gets noisy.

Use this page to keep yourself grounded.

When I feel stuck, I'll remind myself that...

The habits I'll stick to this year are...

My accountability buddy / mentor is...

My reward when I hit my 2026 goal will be...

Success in property isn't about timing the market
- it's about **time in the market.**



End-of-year reflection

Take stock before turning the page

By the end of the year, you'll have made progress - and probably more than you think. Use this space to capture it while it's fresh. It'll make planning 2027 much easier.

What progress did I make in 2026?

What surprised me most?

What's my biggest lesson?

How will I build on this in 2027?



**Ready for your next step?
We're here when you need us.**

Book a call today

As seen on:


THE SUNDAY TIMES

BBC

Daily Mail

CITYA.M.

propertyhub.net/goals-planner

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