

The CDL Guide

Career Planning Worksheet

www.TheCDLGuide.com

Your Personal Roadmap to Trucking Success

INSTRUCTIONS:

- Print this worksheet and fill it out by hand for planning
- Use this alongside the digital CDL Career Roadmap guide
- Review and update your goals and progress regularly
- Keep this handy during your CDL journey for quick reference
- Share relevant sections with family and advisors

TIP: Complete this worksheet before starting your CDL preparation to maximize your success and avoid costly mistakes.

Date Generated: 9/18/2025

Personal Information & Goals

Basic Information

Full Name:

Current Age:

Phone Number:

Email Address:

Current Address:

Emergency Contact Name & Phone:

Current Situation

Current Job/Career:

Current Annual Income: \$

Years of Driving Experience:

Type of Vehicles Driven (car, pickup, van, etc.):

Any Commercial Driving Experience:

Career Goals & Timeline

Primary Goal for Getting CDL:

Desired Annual Income Target: \$

Preferred Type of Trucking (Local, Regional, OTR, Specialized):

Target Start Date for CDL School:

Target Date to Start First Trucking Job:

5-Year Career Vision:

Financial Planning & Budget

Current Financial Situation

Monthly Take-Home Income: \$

Monthly Fixed Expenses: \$

Monthly Variable Expenses: \$

Current Savings Available: \$

Credit Score (if known):

Outstanding Debts: \$

CDL Training Budget

Estimated CDL School Cost: \$

Living Expenses During Training: \$

Transportation/Housing Costs: \$

Emergency Fund Needed: \$

Total Budget Required: \$

Financing Plan (savings, loans, grants):

Income Transition Plan

Last Month of Current Job Income:

Expected Gap Between Jobs (weeks):

Estimated First-Year Trucking Income: \$

Plan for Income Gap:

CDL Preparation Checklist

Legal Requirements

- ☐ Obtain current driving record (MVR)
- ☐ Schedule DOT physical examination
- ☐ Gather required documents (birth certificate, SSN card)
- ☐ Check age requirements (18+ intrastate, 21+ interstate)
- ☐ Research state-specific CDL requirements
- ☐ Apply for CDL learner's permit
- ☐ Study CDL manual for your state

School Research & Selection

- | | |
|---|---|
| <input type="checkbox"/> Research 3+ CDL schools in area | <input type="checkbox"/> Verify job placement assistance |
| <input type="checkbox"/> Visit schools and tour facilities | <input type="checkbox"/> Review contract terms carefully |
| <input type="checkbox"/> Compare program costs and financing | <input type="checkbox"/> Avoid high-pressure enrollment tactics |
| <input type="checkbox"/> Check school accreditation and reviews | <input type="checkbox"/> Get all promises in writing |

Family & Personal Preparation

- ☐ Discuss career change with family
- ☐ Plan for time away during training
- ☐ Arrange childcare if needed
- ☐ Organize finances for training period
- ☐ Set realistic expectations with family
- ☐ Plan communication during OTR training

CDL School Research & Notes

School Option 1

School Name:

Location:

Phone:

Program Length:

Total Cost: \$

Financing Available:

Job Placement Rate:

Equipment/Facilities Quality:

Pros:

Cons:

School Option 2

School Name:

Location:

Phone:

Program Length:

Total Cost: \$

Financing Available:

Job Placement Rate:

Equipment/Facilities Quality:

Pros:

Cons:

First Job Planning & Company Research

Job Search Strategy

Preferred Home Time (daily, weekly, bi-weekly):

Maximum Distance Willing to Travel:

Preferred Freight Type:

Minimum Acceptable Pay Rate: \$

Benefits Requirements (health, dental, retirement):

Equipment Preferences (truck type, age, features):

Company Research List

Company 1 Name:

Pay Rate: \$

Home Time:

Benefits:

Notes:

Company 2 Name:

Pay Rate: \$

Home Time:

Benefits:

Notes:

Company 3 Name:

Pay Rate: \$

Home Time:

Benefits:

Notes:

Company 4 Name:

Pay Rate: \$

Home Time:

Benefits:

Notes:

Company 5 Name:

Pay Rate: \$

Home Time:

Benefits:

Notes:

Progress Tracking & Milestones

Key Milestones

- | | |
|--|-------------|
| <input type="checkbox"/> CDL Learner's Permit Obtained | Date: _____ |
| <input type="checkbox"/> CDL School Enrollment | Date: _____ |
| <input type="checkbox"/> Classroom Training Completed | Date: _____ |
| <input type="checkbox"/> Behind-the-Wheel Training Completed | Date: _____ |
| <input type="checkbox"/> CDL Skills Test Passed | Date: _____ |
| <input type="checkbox"/> CDL License Received | Date: _____ |
| <input type="checkbox"/> First Job Offer Received | Date: _____ |
| <input type="checkbox"/> Started First Trucking Job | Date: _____ |
| <input type="checkbox"/> Completed First Month | Date: _____ |
| <input type="checkbox"/> Completed First Year | Date: _____ |

Weekly Progress Notes

Week 1 Progress & Notes:

Week 2 Progress & Notes:

Week 3 Progress & Notes:

Week 4 Progress & Notes:

Week 5 Progress & Notes:

Week 6 Progress & Notes:

Week 7 Progress & Notes:

Week 8 Progress & Notes:

Emergency Contacts & Important Information

Important Phone Numbers

CDL School Main Number:

CDL School Instructor:

State DMV CDL Office:

DOT Medical Examiner:

Insurance Agent:

Bank/Credit Union:

Family Emergency Contact:

Document Storage Locations

Birth Certificate:

Social Security Card:

Current Driver's License:

CDL Learner's Permit:

DOT Medical Certificate:

CDL School Certificate:

Employment Records:

Insurance Documents:

Notes & Reminders

Important Deadlines:

Questions to Ask:

Additional Notes:
