



Goal Achievement Plan



BACKGROUND

	Client 1	Client 2
First name/s		
Surname		
DOB		
Number of children		
Children's DOBs		

INCOME

Gross Income				
Investment Income				
Other Income				
How much can you save per week?	\$0.00	\$50.00	\$100.00	\$200.00
Any notes you'd like to add				





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ASSETS

	Client 1	Client 2	Joint
Home			
Cars/Boat/Caravan			
Bank Accounts			
Investment Property(s)			
Shares & Managed Funds			
Superannuation Fund			
Any notes you'd like to add			

LIABILITIES

Home Mortgage			
Investment Loan			
Personal/Car Loan			
Credit Cards			
Any notes you'd like to add			





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GOALS

What do you want to achieve in the next 1 to 5 years and in retirement

Joint

When do you wish to retire?

How much do you wish to retire on per week?

What cash generating assets do you wish to own?

What do you want your debt levels to be?

What do you want your super to look like?

How much Tax would you like to save each year prior to retirement?

Lifestyle? (holidays, travel, hobbies)

What legacy would you like to leave the family?

Get your Will done or updated?

YES

NO





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ISSUES

ISSUES	
	Joint
What are your 3 biggest issues?	
What is your no.1 issue to solve right now?	
What's stopping you achieving your goals without our help?	
Any notes you'd like to add	

VALUE

We could certainly help you solve your issues and achieve

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If we solved your issues and helped you achieve your goals, what would it mean to you?	

CONSEQUENCES

To achieve your goals, you will need to change and do something different

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To achieve your goals, you will need to change and do something different	
What is the outcome of you NOT doing something different?	





Goal Achievement Plan



TIMING

Is this a later or sooner project for you to get started to fix your issues?

LATER

SOONER

FOLLOW UP DATES

Implementation date

Follow up meeting date

NOTES

