

# Financial Plan of Action

Ahakoā iti, he pounamu  
Treasure even the smallest of achievements

*"This is for you, your family and  
whānau to use. Your financial  
mentor will help by supporting and  
guiding you as you fill it in."*

Name(s): \_\_\_\_\_

Start date: \_\_\_\_\_



MINISTRY OF SOCIAL  
DEVELOPMENT  
TE MANATŪ WHAKAHIATO ORA

# 1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

We'd like to achieve:

These are important because:

**Our Goals**  
Short and long term

If we did this it would look and feel like:

They are this important (1-10):

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Goals

Reality

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Way forward

The things going on for us are:

What we wish was happening is:

**Our Reality**

What we were doing differently then was:

Times when it has been better are:

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Goals

Reality

Options

Way forward

If a miracle happened, things would be like this:

If this miracle is a '10', we are now at (1-10):

Things we were doing differently then were:

Times when it has been closer to '10' are:

**Our Options**



# 1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

To move one step closer to the miracle we can:

Our confidence in doing this is (1-10):

**Our Way Forward**

If things become difficult we will:

Support we need to make this happen is:



**Strengths**

## 2 ACTION: Putting our way forward into action

Another step closer

What we'll do:

Who will do it:

How  
we'll celebrate:

What or who we'll need to help us:

When we'll do it:

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