Financial Plan of Action

Ahakoa iti, he pounamu Treasure even the smallest of achievements

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

Name(s):
Start date:





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 They are this important (1-10): If we did this it would look and feel like:

1 PLAN: Putting our goals and strengths onto paper Goals Reality Options

What we wish was happening is: The things going on for us are: **Our Reality** What we were doing differently then was: Times when it has been better are:

Way forward



PLAN: Putting our goals and strengths onto paper

Goals Reality

Options

Way forward

If this miracle is a '10', we are now at (1-10): If a miracle happened, things would be like this: **Our Options** Things we were doing differently then were: Times when it has been closer to '10' are:



PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

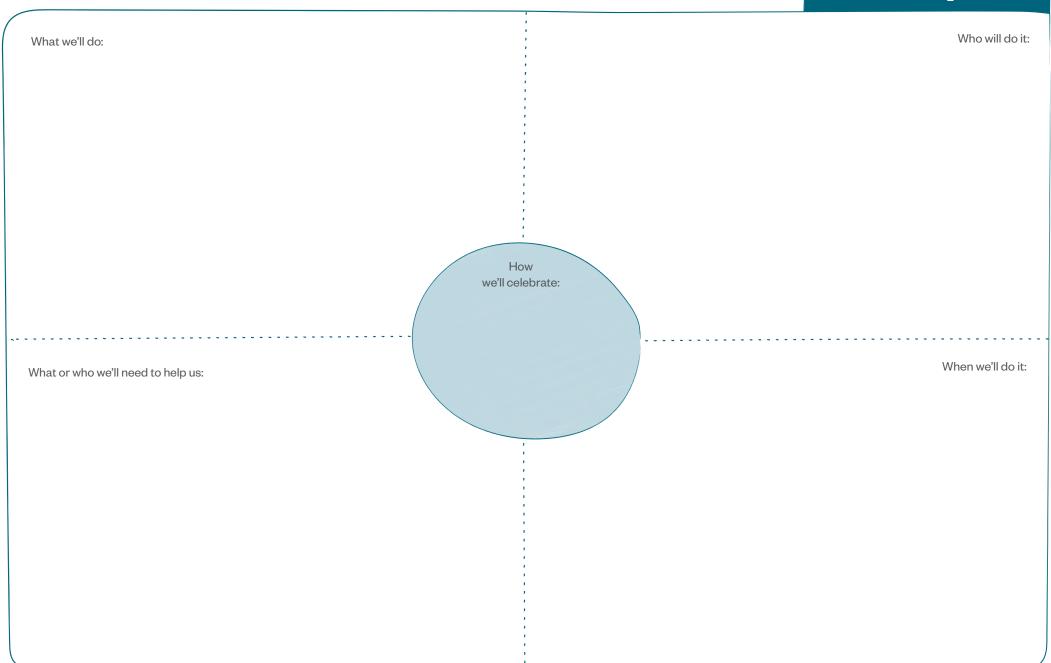
To move one step closer to the miracle we can: Our confidence in doing this is (1-10): Our Way Forward If things become difficult we will: Support we need to make this happen is:





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What we'll do:)))	Who will do it:
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	we'll celebrate:	
What or who we'll need to help us:		When we'll do it:
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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:



What we'll do:	Who will do it:
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	How
	we'll celebrate:
What or who we'll need to help us:	When we'll do it:
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