

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

Overview of the Financial Plan of Action

Financial Plan of Action
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1 PLAN: Putting our goals and strengths onto paper

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: _____

Our Goals
Short and long term

We'd like to achieve these goals: _____

These goals are important because: _____

These goals are this important (1-10): _____

When we reach our goals it will look and feel like: _____

Our Reality

The things going on for us are: _____

What we would like to see happen instead: _____

When has the problem been better: _____

What is different about those times: _____

Our Way Forward

To move one step closer to the goals we can: _____

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

Support we need to make this happen is: _____

If things become difficult we will: _____

Our Options

If something wonderful happened, things would be like this: _____

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

When: _____

This is what you and your financial mentor will work on together.

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2 ACTION: Putting our way forward into action

Strengths:

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: _____

Another step closer

What we'll do: _____

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1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

We'd like to achieve these goals:

These goals are important because:



Our Goals
Short and long term



These goals are this important (1-10):

When we reach our goals it will look and feel like:



1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

The things going on for us are:

What we would like to see happen instead:



Our Reality

What is different about those times:



When has the problem been better:



1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

If something wonderful happened, things would be like this:

If the improved situation is a '10',
we are now at (1-10):

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

When things were better what were we doing:

Our Options



1 PLAN: Putting our goals and strengths onto paper

Goals

Reality

Options

Way forward

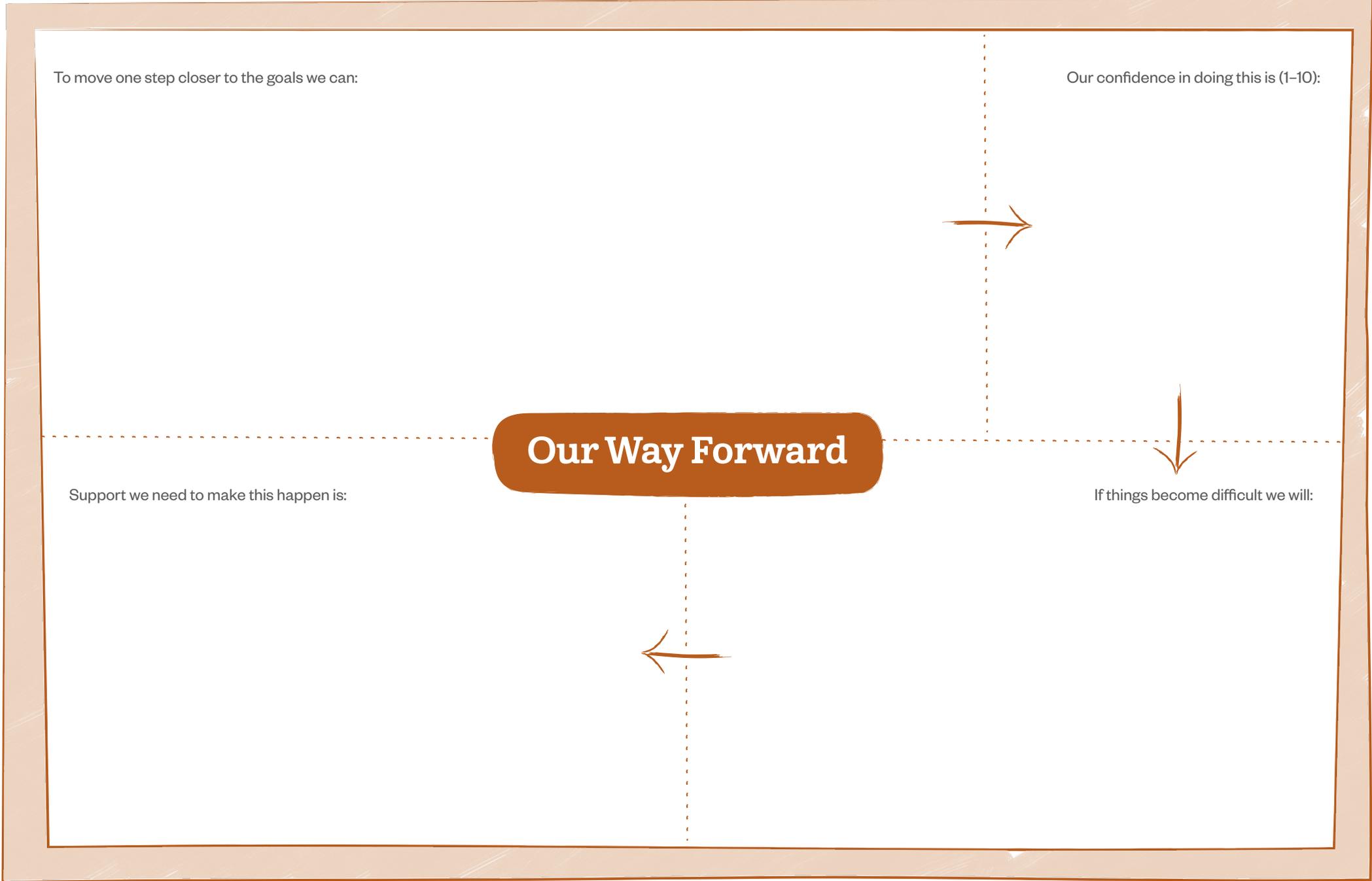
To move one step closer to the goals we can:

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

Our Way Forward

Support we need to make this happen is:

If things become difficult we will:





Strengths

2 ACTION: Putting our way forward into action

Another step closer

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