

Client-led outcomes

Client name:

Date:

My Goal is:

Provider use only

Key financial capability target (✓ tick one):

- Immediate one-session need
- Budgeting to help keep track and stabilise
- Strategies to increase income
- Strategies to decrease spending
- Starting a savings plan
- Understanding and reducing debt
- Learning new money skills / updating knowledge
- Other

Client engagement (✓ tick one): 1 session 2-3 sessions 4+ sessions
 Kahukura Did not complete

How do you feel about your progress towards reaching your goal today?

Session	Date	0 I've just started my journey	1	2	3	4	5 Halfway there	6	7	8	9	10 I've fully reached my goal
Start session												
2												
3												
4												
5												
6												
7												
8												
9												
Final session												

Please tick (✓) how you feel about your progress towards reaching your goal today

Note: The scale is from dark to light (0 to 10). The darkest shade means you have only just begun your journey, a medium shade means you're making progress, and the lightest shade means you feel you've achieved your goal.