

# Financial Plan of Action

Ahakoia 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: \_\_\_\_\_

## 1 PLAN: Putting our goals and strengths onto paper

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:

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:

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:

If something wonderful happened, things would be like this:

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

Our Options

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

When things were better what were we doing:

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## 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:

### Strengths:

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### Another step closer

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