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?** |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Session | Date | I’ve just started my journey |  | Halfway there |  | 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.*  |