



Goal Achievement Plan



Download the Goal Achievement Plan form, save it to your folder or desktop, and submit (via page 5 or 9) to our team for review.

BACKGROUND			
	Client 1		Client 2
First name/s			
Surname			
DOB			
Number of children			
Children's DOBs			

INCOME			
Gross Income			
Investment Income			
Other Income			
How much can you save per week?	\$0.00	\$50.00	\$100.00 \$200.00
Any notes you'd like to add			





Goal Achievement Plan



ASSETS

	Client 1	Client 2	Joint
Home			
Cars/Boat/Caravan			
Bank Accounts			
Investment Property(s)			
Shares & Managed Funds			
Superannuation Fund			
Any notes you'd like to add			

LIABILITIES

Home Mortgage			
Investment Loan			
Personal/Car Loan			
Credit Cards			
Any notes you'd like to add			





Goal Achievement Plan



GOALS

What do you want to achieve in the next 1 to 5 years and in retirement

		Joint	
When do you wish to retire?			
How much do you wish to retire on per week?			
What cash generating assets do you wish to own?			
What do you want your debt levels to be?			
What do you want your super to look like?			
How much Tax would you like to save each year prior to retirement?			
Lifestyle? (holidays, travel, hobbies)			
What legacy would you like to leave the family?			
Get your Will done or updated?	YES	NO	





Goal Achievement Plan



ISSUES

ISSUES	
	Joint
What are your 3 biggest issues?	
What is your no.1 issue to solve right now?	
What's stopping you achieving your goals without our help?	
Any notes you'd like to add	

VALUE

We could certainly help you solve your issues and achieve

VALUE	
We could certainly help you solve your issues and achieve	
If we solved your issues and helped you achieve your goals, what would it mean to you?	

CONSEQUENCES

To achieve your goals, you will need to change and do something different

CONSEQUENCES	
To achieve your goals, you will need to change and do something different	
What is the outcome of you NOT doing something different?	





Goal Achievement Plan



TIMING

Is this a later or sooner project for you to get started to fix your issues?

LATER

SOONER

FOLLOW UP DATES

Implementation date

Follow up meeting date

NOTES

Download the Goal Achievement Plan form, save it to your folder or desktop, and submit to our team for review.





Goal Achievement Plan Business



WELCOME

Set Scene Business Name

Date

Always wanted to help

Questions to ask about where you want to take your financial life – your goals

Discover immediate issues – solve those

BACKGROUND

(current situation): So that I can really help, tell me more about your current situation

Revenue \$

Profit \$

Debt (total) \$

Cashflow rating (1-10)

1 2 3 4 5 6 7 8 9 10

What cash generating assets do you have?

What's been the growth rate (3 years)?

What were your goals when starting out?

How much of your time is in the business?

How well will your business operate without you?

What is your current insurance cover?

How well do you think your assets are protected?

When was the last time your wills were updated?





Goal Achievement Plan Business



GOALS <i>What do you want to achieve in the next 1 to 5 years and in retirement</i>	
Revenue	
Profit	
Cashflow per month	
Debt level	
Cash generating assets	
Your time in business	
When like to sell	
Lifestyle goals (vacation, travel, hobbies)	
Legacy to leave behind	





Goal Achievement Plan Business



ISSUES

Problems to solve

What are the 3 biggest business issues in business?

What's your no. 1 business issue to solve immediately?

What's stopping you achieve your goals without our help?

VALUE

We could certainly help you solve your issues and achieve

We can help you solve your issues and achieve your goals. If we could help you solve your current issues and help you to achieve your goals – what would it mean to you?

CONSEQUENCES

To achieve your goals, you will need to change and do something different

To achieve your goals, you'll need to change (insert change needed) and do something different. What are the consequences of you NOT doing something different?





Goal Achievement Plan Business



TIMING		
To get started and fix the current issues, is this a later or sooner project for you?	LATER	SOONER

FOLLOW UP DATES	
Implementation date	
Follow up meeting date	

NOTES

Download the Goal Achievement Plan form, save it to your folder or desktop, and submit to our team for review.





Goal Achievement Plan Business



POSSIBLE PROJECTS THAT YOU COULD HELP WITH:

Goal setting	
Cashflow and cash management?	
Risk management	

MEETING TIPS

1. Your objective is to make sure that all clients are buying every service from you that helps them achieve their goals.
2. You are not in this meeting to give advice.
3. Do not go armed with a long list of questions to ask—you'll get confused. Just remember the 8-step process and let it flow.
4. Make sure you have all the decision makers in the meeting—you are wasting your time otherwise. If you do not have all the decision makers in front of you, you will need to rebook the meeting.
5. It's a conversation—not an interrogation. Use question softeners before each question. 'Could I just ask', 'So that I can understand' etc
6. Your tonality will play a part in your success. If you have a weak tone or you mumble, then you will not make as many sales.
7. Your enthusiasm is important. Tell the clients if they have a good business and make sure you smile.
8. Spend most of your time on the BACKGROUND, GOALS AND PROBLEMS – flesh them out and keep digging until you get good answers.
9. Always, always book the next steps—book a meeting from a meeting—BAMFAM.
10. Remember to have fun. They can only say no. Every no you get is closer to yes.

NOTES

If you get really stuck in your meetings, you could ask the following question to flush out the highest motivation right now.

"Our work with business owners like you is focused on five key areas. We are helping our clients to

- (1) grow revenue and wealth,
- (2) dramatically increase profit,
- (3) minimize tax,
- (4) protect assets, and
- (5) improve cash flow.

Which of those are most important to you right now?"

Then let them talk. You are flushing out the core objectives at the outset by asking questions like this.

