

Financial Goal Planning Sheet

MY FINANCIAL GOALS		
WEEKLY: \$ _____	MONTHLY: \$ _____	YEARLY: \$ _____
INCOME		
$\$ \text{ ______ PER WORKSHOP IN SALES MULTIPLIED BY 20\% (INSTANT INCOME) = } \$ \text{ ______ PER WORKSHOP.}$		
$\text{MONTHLY INCOME GOAL } \$ \text{ ______ DIVIDED BY } \$ \text{ ______ PER WORKSHOP = } \text{ ______ (NUMBER OF WORKSHOPS PER MONTH NEEDED TO ACHIEVE FINANCIAL GOAL)}$		
EXPENSES		
WORKSHOPS	RECRUITING	
Materials _____	Brochures _____	
Incentives _____	Mailings _____	
Mailing/Catalog _____	Materials _____	
Child Care _____	Phone Calls _____	
Drive/Travel _____	Incentives _____	
TOTAL _____	TOTAL _____	
GOALS		
SHORT-TERM GOALS (Example: To present one workshop per week.)	STEPS TO ACHIEVEMENT (Example: Determine the number of contacts needed to book 1 workshop per week.)	
LONG-TERM GOALS (Example: Money to attend convention and leadership conference.)	STEPS TO ACHIEVEMENT (Example: Determine the cost to attend events, divide by number of months to determine the monthly amount you need to save.)	
CONSIDER THE AMOUNT OF INCOME YOU ARE WILLING TO REINVEST IN YOUR BUSINESS.		
<ul style="list-style-type: none"> • For example, you could keep all your instant income and reinvest everything you make above that 20%. • You could reinvest 100% of your earnings for the first six months of your business. • (Whatever is right for you) _____ 		