Planning Session: Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

30 Day Financial Goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­\_\_\_\_\_\_\_\_\_\_\_\_

What were last week’s results: (Did my Hypothesis prove true?)

What is my weekly Hypothesis: (What do I predict to happen?)

Clients (Current) What tasks need to be done?

Leads & Potential Client Tasks to be done?

What do I need to get done for the business? (Internally)

How does my cashflow look? Do I need to get more this week?

Financial: What do I need to pay this week? Expenses or Taxes?

Prioritization of My Tasks: Top 5 Priorities

1.What’s the most important thing?

2. Second most important

3. Third most important

4. Fourth most important

5. Fifth most important

Notes:

Notes: