

FINANCIAL VISION BOARD

FAIL TO PLAN,
PLAN TO FAIL
WINSTON CHURCHILL

ARE ANY OF THESE YOUR GOALS?

- ✓ GET A HOME LOAN
- ✓ BUY A CAR
- ✓ KIDS PRIVATE EDUCATION
- ✓ INVEST IN PROPERTY
- ✓ HOLIDAY/TRAVEL
- ✓ CONSOLIDATE SUPER

GOAL 1

SMART (Specific/Measurable/Attainable/Relevant/Time-bound)

Steps

Start Date:

Completion Date:

GOAL 2

SMART (Specific/Measurable/Attainable/Relevant/Time-bound)

Steps

Start Date:

Completion Date:

GOAL 3

SMART (Specific/Measurable/Attainable/Relevant/Time-bound)

Steps

Start Date:

Completion Date:



Need Help with your vision?

Book a free appointment **1300 49 11 41**

