

FFTTM Action Plan (Vision)

(Required elements are underlined.)

Client Name: _____

Staff: _____

Start Date: _____

End Date: _____

Vision Narrative: _____

Client Goal	Goal Action(s)	Target Completion Date	Actual Completion Date	Description
Budgeting	<input type="checkbox"/> Document all spending <input type="checkbox"/> Lower expenses <input type="checkbox"/> Other			
Budgeting	<input type="checkbox"/> Document all spending <input type="checkbox"/> Lower expenses <input type="checkbox"/> Other			
Credit Building	<input type="checkbox"/> Keep balances low <input type="checkbox"/> Open new tradelines <input type="checkbox"/> Pay bills on time <input type="checkbox"/> Resolve errors/issues <input type="checkbox"/> Other			
Credit Building	<input type="checkbox"/> Keep balances low <input type="checkbox"/> Open new tradelines <input type="checkbox"/> Pay bills on time <input type="checkbox"/> Resolve errors/issues <input type="checkbox"/> Other			
Debt Management	<input type="checkbox"/> Call to negotiate better terms <input type="checkbox"/> Make lump sum payment <input type="checkbox"/> Move debt to lower interest credit card or loan <input type="checkbox"/> Set up payment plan <input type="checkbox"/> Other			

FFT™ Action Plan (Vision)

(Required elements are underlined.)

Debt Management	<input type="checkbox"/> Call to negotiate better terms <input type="checkbox"/> Make lump sum payment <input type="checkbox"/> Move debt to lower interest credit card or loan <input type="checkbox"/> Set up payment plan <input type="checkbox"/> Other			
Savings/Investing	<input type="checkbox"/> Direct deposit to retirement (auto deduct) <input type="checkbox"/> Direct deposit to savings <input type="checkbox"/> Open savings account <input type="checkbox"/> Open retirement account <input type="checkbox"/> Other			
Savings/Investing	<input type="checkbox"/> Direct deposit to retirement (auto deduct) <input type="checkbox"/> Direct deposit to savings <input type="checkbox"/> Open savings account <input type="checkbox"/> Open retirement account <input type="checkbox"/> Other			
Transacting	<input type="checkbox"/> Open checking account <input type="checkbox"/> Open stored value card (prepaid card) <input type="checkbox"/> Other			
Transacting	<input type="checkbox"/> Open checking account <input type="checkbox"/> Open stored value card (prepaid card) <input type="checkbox"/> Other			

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