

## FFT™ Action Plan (Vision)

(Required elements are underlined.)

**Client Name:** \_\_\_\_\_

**Staff:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_

**End Date:** \_\_\_\_\_

**Vision Narrative:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

<b>Client Goal</b>	<b>Goal Action(s)</b>	<b>Target Completion Date</b>	<b>Actual Completion Date</b>	<b>Description</b>
<b>Budgeting</b>	<input type="checkbox"/> Document all spending <input type="checkbox"/> Lower expenses <input type="checkbox"/> Other			
<b>Budgeting</b>	<input type="checkbox"/> Document all spending <input type="checkbox"/> Lower expenses <input type="checkbox"/> Other			
<b>Credit Building</b>	<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			
<b>Credit Building</b>	<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			
<b>Debt Management</b>	<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			

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<b>Savings/Investing</b>	<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			
<b>Savings/Investing</b>	<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			
<b>Transacting</b>	<input type="checkbox"/> Open checking account <input type="checkbox"/> Open stored value card (prepaid card) <input type="checkbox"/> Other			
<b>Transacting</b>	<input type="checkbox"/> Open checking account <input type="checkbox"/> Open stored value card (prepaid card) <input type="checkbox"/> Other			

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(Required elements are underlined.)

<b>Microenterprise</b>	<input type="checkbox"/> Create a business plan <input type="checkbox"/> Develop a marketing plan <input type="checkbox"/> Open a business account <input type="checkbox"/> Hire first employee <input type="checkbox"/> Enroll in training <input type="checkbox"/> Incorporate the business <input type="checkbox"/> Register for state and federal tax ID number <input type="checkbox"/> Apply for license(s)/permit(s) <input type="checkbox"/> Other			
<b>Microenterprise</b>	<input type="checkbox"/> Create a business plan <input type="checkbox"/> Develop a marketing plan <input type="checkbox"/> Open a business account <input type="checkbox"/> Hire first employee <input type="checkbox"/> Enroll in training <input type="checkbox"/> Incorporate the business <input type="checkbox"/> Register for state and federal tax ID number <input type="checkbox"/> Apply for license(s)/permit(s) <input type="checkbox"/> Other			

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