

# Our Goal Planner!

|   |   |  |  |  |
|---|---|--|--|--|
| <b>JANUARY</b><br>Goal:<br><br>Expected cost:<br>\$_____  | <b>FEBRUARY</b><br>Goal:<br><br>Expected cost:<br>\$_____ | <b>MARCH</b><br>Goal:<br><br>Expected cost:<br>\$_____                                       | <b>APRIL</b><br>Goal:<br><br>Expected cost:<br>\$_____                       | <b>MAY</b><br>Goal:<br><br>Expected cost:<br>\$_____   |
| <b>JUNE</b><br>Goal:<br><br>Expected cost:<br>\$_____     | <b>JULY</b><br>Goal:<br><br>Expected cost:<br>\$_____     | <b>AUGUST</b><br>Goal:<br><br>Expected cost:<br>\$_____                                      | <b>SEPTEMBER</b><br>Goal:<br><br>Expected cost:<br>\$_____                   | <b>OCTOBER</b><br>Goal:<br><br>Expected cost:<br>\$_____   |
| <b>NOVEMBER</b><br>Goal:<br><br>Expected cost:<br>\$_____ | <b>DECEMBER</b><br>Goal:<br><br>Expected cost:<br>\$_____ | <b>KEY DATES:</b><br>> Birthdays<br>> Xmas/New Year<br>> School holidays<br>> Fitness events | <b>GOAL IDEAS:</b><br>> Get fit<br>> Get finances in order<br>> Pay off debt | <b>GOAL IDEAS:</b><br>> Take a trip<br>> Build a \$ buffer<br>> Review KiwiSaver<br>> Learn a new skill                      |
| <b>BIG GOALS FOR NEXT YEAR +</b><br>><br><br>>            | <b>BIG GOALS FOR NEXT YEAR +</b><br>><br><br>>            | <b>BIG GOALS FOR NEXT YEAR +</b><br>><br><br>>   | <b>BIG GOALS FOR NEXT YEAR +</b><br>><br><br>>                               | <b>NEXT STEP?</b><br>Get your goals happening faster with a Financial 'Starter Plan' –<br>> Talk to Cole Murray <b>ASAP!</b> |



**Wealth  
Generation**



**Debt  
Structuring**  
Mortgages  
and Loans



**Risk  
Management**  
Insurance/  
Life Insurance



**Retirement  
Planning**  
KiwiSaver



**Financial  
Planning**