



# THE ELITE WEALTH MANAGER

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

## Weekly Action Plan for Peer Coaching

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Action plan for week of: \_\_\_\_\_

12-week focus: \_\_\_\_\_

Quarterly goals:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Goals for this week:

1. \_\_\_\_\_
2. \_\_\_\_\_

Specific actions to accomplish this week's goals:

1. \_\_\_\_\_  
\_\_\_\_\_ Calendar time: \_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_ Calendar time: \_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_ Calendar time: \_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_ Calendar time: \_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_ Calendar time: \_\_\_\_\_