



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: _____