



# THE ELITE WEALTH MANAGER

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

## Weekly Action Plan for Accountability Partnerships

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

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

Weekly 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: \_\_\_\_\_