

Financial Coaching Action Plan Worksheet¹



The most important reasons why I want to take action/make this change are:

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My main goals for taking action/making this change are:

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I plan to do these things to accomplish my goals:

Specific action	By when

Other people could help me with actions/change in these ways:

Person	Possible ways to help

There might be some possible obstacles to change, and here is how I could handle them:

Possible obstacles	How to respond

I will know my plan is working when I see these results:

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¹ Adapted from Motivational Interviewing, Second Edition, 2002, by William Miller and Stephen Rollnick.