Wealth Creation Planner

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Name:

Date:

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Weekly Wealth Review

Score yourself on a scale of 1-5 in each of the following areas,
(1 = lowest, 5 = highest experience of satisfaction)

Physical/Spiritual

1 2 3 4 5

Life Purpose

1 2 3 4 5

Time

1 2 3 4 5

Relationships

1 2 3 4 5

Financial

1 2 3 4 5

3 areas to improve

What went well and why?

3 things that went well and why

Three small wins

3 wins I experienced

Growth areas

3 areas for growth

Next Wealth Flow action steps

3 action steps

Income generation	M	T	W	T	F	S	S	Goal	Achieved
People connected with									
Invited to coaching conversation									
Coached but not clients yet									
Number of No's collected									
Value of proposals sent									
People served									
Revenue received									