



My financial plan builder

A tool to help you plan
your key steps to help you
work towards your goal(s).

Make money work for you



My financial action plan

My personal and joint goals

Use this live document by editing, saving and updating it as your goals and plans change.

Goal 1

When I want to achieve it

Date I actually achieved it

Goal 2

When I want to achieve it

Date I actually achieved it

Goal 3

When I want to achieve it

Date I actually achieved it

The key steps I need to take to achieve my goals are:
For example: I want to save £200 by the end of this year, or I want to improve my credit score by 100 points.

1.
2.
3.
4.
5.

Key milestones I'd like to achieve

- Think about the actions you want to take to help you achieve your goal(s).
- Input key milestones and when you'd like to achieve them into the calendar to help keep you on track.
- Start with your end goal and work backwards to help you decide what milestones you'd like to achieve and when.

Year:

January	February	March	April	May	June
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July	August	September	October	November	December
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Year:

January	February	March	April	May	June
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July	August	September	October	November	December
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My Barclays Money Mentor® is:

My Mentor's contact details are:

My next appointment is:

To book an appointment or find out more information search 'Barclays Money Mentors'

My financial action plan

Notes: