



# 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'

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Notes: