

GOAL TRACKER



CLEAR PATH
A D V I S O R Y

Client: _____

Date: _____

Peace of Mind
Accountability
Professional Guidance
Preventing the Big Mistake
Managing Behavior
Clarity
Simplicity

Setting Priorities / Onboarding

| Goal | Next Steps and Timing |
|------|-----------------------|
| 1. | |
| 2. | |
| 3. | |
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| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

Goals Completed

| Goal | Next Steps and Timing |
|------|-----------------------|
| 1. | |
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BUSINESS GOAL TRACKER



CLEAR PATH ADVISORY

Client: _____

Assistance with Building Your Business
A Wealthy Retirement Plan
Accountability
Organization
Clear Goals
Peace of Mind

Date: _____

Setting Priorities / Onboarding

| Goal | Next Steps and Timing |
|------|-----------------------|
| 1. | |
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Goals Completed

| Goal | Next Steps and Timing |
|------|-----------------------|
| 1. | |
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