



## BUSINESS PLAN WORKSHEET

\_\_\_\_\_  
Current Level

\_\_\_\_\_  
Next Promotion Level

\_\_\_\_\_  
Current Production

\_\_\_\_\_  
Promotion Requirements

Goals for the number of new Associates\_\_\_\_\_, sales\_\_\_\_\_, points\_\_\_\_\_, income\_\_\_\_\_ each month.

Time/Resources you are willing to commit:

\_\_\_\_\_ Number of evenings/hours per week

\_\_\_\_\_ Number of BPM invitations per week

\_\_\_\_\_ Number of BPM/BMP guests per week

\_\_\_\_\_ Number of Follow-Up Interviews per week

\_\_\_\_\_ Number of new Associates per week

\_\_\_\_\_ Number of WFG Financial Strategy\* presentations per week

\_\_\_\_\_ Number of new clients per week

Deadline to achieve your goals: \_\_\_\_\_

\* A WFG Financial Strategy is a customized suitability and needs analysis developed by World Financial Group. The analysis is based upon information obtained from sources believed to be reliable and accurate.