

# Business Plan

## Business vision and goals for this year

Clients who work with me achieve (from value proposition).....

Key Marketing activities	Key sales activities

## Finance Plan

Upfront commission fee goal	\$
Trail fee goal	\$
Other revenue goal	\$
Personal income goal	\$
Expected annual business expenses	\$
Profit goal	\$

Expected loan book size by the end of the year      \$

## Key measures (KPI's)

Measure	Goal
Application to settlement ratio	
Appointment to application ratio	
Lead to appointment ratio	
Lead to settlement ratio	
Average client satisfaction rating	
Average number of referrals per client	

