

Which markets and opportunities to exploit?

In what marketing activities to participate?

How and when will those activities be implemented?

Will there be new equipment, personnel, or contacts?

What will your "signature" be?(for example, special activities or favors for new listings, house warmings, etc.)

Weekly Targets				
	Week #			
	1	2	3	4
# New Listings				
Target				
Actual				
\$ New Listings				
Target				
Actual				
# Listings in Inventory				
Target				
Actual				
\$ Listings in Inventory				
Target				
Actual				
# Current Listings Informed and Talked to				
Target				
Actual				
# Showings				
Target				
Actual				
\$ Showings				
Target				
Actual				
# People in my pipeline				
Target				
Actual				
# Open Houses				
Target				
Actual				
\$ Open Houses				
Target				
Actual				
Direct Mail:				
Target				
Actual				
Followup Calls				
Target				
Actual				
Appointments				
Target				
Actual				
# Closings				

Weekly Targets				
	Week #			
	1	2	3	4
Target				
Actual				
\$ Closings				
Target				
Actual				

Monthly Targets

	Month #											
	1	2	3	4	5	6	7	8	9	10	11	12
# New Listings												
Target												
Actual												
\$ New Listings												
Target												
Actual												
# Listings in Inventory												
Target												
Actual												
\$ Listings in Inventory												
Target												
Actual												
# Current Listings Informed and Talked to												
Target												
Actual												
# Showings												
Target												
Actual												
\$ Showings												
Target												
Actual												
# People in my pipeline												
Target												
Actual												
# Open Houses												
Target												
Actual												
\$ Open Houses												
Target												

Actual												
Direct Mail:												
Target												
Actual												
Followup Calls												
Target												
Actual												
Appointments												
Target												
Actual												
# Closings												
Target												
Actual												
\$ Closings												
Target												
Actual												

Goals For My Success

Date

Target Date

My Goal

Costs and Time To Meet This Goal

Is it worth the time, effort, and money to attain this goal?

Benefits to Me

Obstacles

Strategies to Overcome Obstacles

Aids to Achievement -

Include pictures, photographs, and other icons, or symbols to visualize my goal

By using categories to assign goals and priorities one may find goal setting more straightforward.

Moreover - there will be sub-categories one will want to design for one's self.

FINANCIAL AND CAREER

PHYSICAL AND HEALTH

EDUCATIONAL

SOCIAL

LOVED ONES

SPIRITUAL

An example of assigning sub-categories will be in the Financial and Career section:

1. My income
2. My expenses
3. My retirement funding
4. My health insurance
5. My vacation and relaxing time

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Objective	Progress & %	Progress & %	Progress & %	Progress & %
1				
2				
3				
4				
5				

Objective	Motivation	Final Result	This Year's Target
1			
2			
3			
4			
5			

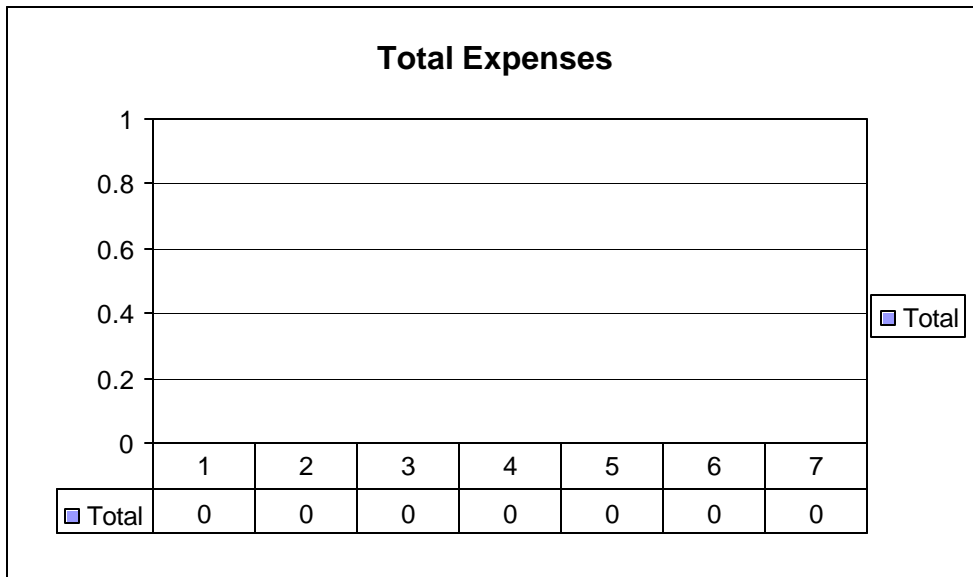
	ACHIEVEMENT	MOTIVATION	FURTHER PROGRESS	SPECIFIC ACTION
1				
2				
3				
4				
5				

Goal	Motivation	Final Result
1		
2		
3		

Real Estate Agent Typical Expenses Comparison and Trend							
Category	Years						
	1	2	3	4	5	6	7
Advertising							
Car or truck							
Commissions or fees							
Depreciation							
Insurance - not health							
Other interest							
Mortgage interest							
Legal & professional							
Office expenses							
Pension & profit sharing							
Rents - vehicles & Equipment							
Rents - other							
Repair and maintenance							
Supplies							
Taxes:							
FUTA							
State unemployment							
Personal property tax							
Real property tax							
941 tax							
Occupation tax							
State bar							
940 tax							
Travel							
Meals & Entertainment							
Utilites							
Other Expenses:							
Accounting							
Bank charges							
Books							
Business gifts							
Business cards							
Closing costs							
Computer maintenance							
Copies							
Costs of closing							
Dues & licenses							
Dues - other							
Education, seminars etc.							
Error and omission insurance							
Insurance - unowned auto							
Keys							
Legal expenses							
Library expenses							
Locks							
Misc							
Misc labor							
MLS & similar dues							

Mobile telephone							
Natural gas							
Notary bonds							
Office gifts							
Office insurance							
Outside labor							
Pager							
Parking							
Photos							
Postage							
PRC							
Printing							
Professional dues							
Professional licenses							
Promotion							
Recording costs							
Signs							
Software							
Tax Prep							
Telephone							
UPS & Other Overnight							
Water							
Other							
Labels							
Business telephone - organizer							
Total	0	0	0	0	0	0	0

Taxes after credits



Be sure to look through your personal checking, savings draws, new loans made, insurance cash distributions, look at charge tickets for your credit cards, look at charge tickets for retail accounts like Lowes, Home Depot, Sears, etc., look at ATM drawings - be sure to consider any source of cash OR place of purchases that you may have charged to (these may not appear in your checks and can be very easy to overlook).

Individuals

Estimated Taxes

4/15

6/15

9/15

1/15

Individual Income Tax Return

4/15