

GOAL TRACKER

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.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Goals Completed

Goal	Next Steps and Timing
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Offit Advisors is not affiliated with Kestra IS or Kestra AS. Neither Kestra IS nor Kestra AS provide tax or legal advice.

BUSINESS GOAL TRACKER

OffitADVISORS

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.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Goals Completed

Goal	Next Steps and Timing
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Offit Advisors is not affiliated with Kestra IS or Kestra AS. Neither Kestra IS nor Kestra AS provide tax or legal advice.

GOAL TRACKER



Client: _____

Date: _____

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

Additional Goals Completed

Goal	Next Steps and Timing
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	
21.	
22.	
23.	
24.	

Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Offit Advisors is not affiliated with Kestra IS or Kestra AS. Neither Kestra IS nor Kestra AS provide tax or legal advice.