|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Target / Actual** | **Trade Volume** | | **% Traded** | | **Fees Collected** | |
|  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Client Call List** |  | **To Do List** |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
| 6. |  |  |
| 7. |  |  |
| 8. |  |  |
| 9. |  |  |
| 10. |  |  |
| 11. |  |  |
| 12. |  |  |
| 13. |  |  |
| 14. |  |  |
| 15. |  |  |
| 16. |  |  |
| 17. |  | **Mining Questions** |
| 18. |  | What other businesses are you involved in? |
| 19. |  | What unsold stock in the business or personally do you have? |
| 20. |  | What holiday homes, time shares etc do you own? |

|  |  |  |
| --- | --- | --- |
| **By The Ways** |  | **Clients and Stock to Promote** |
|  |  | 1. |
| 2. |  | 2. |
| 3. |  | 3. |
| 4. |  | 4. |
|  |  | 5. |
| **New Clients to Promote** |  | 6. |
| 1. |  |  |
| 2. |  | **Lifestyle** |
| 3. |  | 1. |
| 4. |  | 2. |
| 5. |  | 3. |
| 6. |  | 4. |
|  |  | 5. |
| **Wanted List** |  |  |
| VA |  | **Events to Promote** |
|  |  | New Trader Breakfast |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Daily Check List**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **5 x Service Calls** |  |  |  |  |  | **Introduction Requests** | | | | | |  | |  | |  | | |  | | |  | | |
| **20 x Contact Calls** |  |  |  |  |  |  |  |  |  |  |  | |  |  |  | |  |  | |  |  | |  |  |