



TomFerry's

FOR AGENTS



BEST-YEAR-EVER

#TomFerry

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What You Want

Income Goal:

How much money will I produce by carrying out this plan?

Revenue	Expenses	Profit	Wealth				
Gross Commission Income (GCI)	Ref./use Expense Tracker	Net Commission Income (NCI)	Ref./use Wealth Tracker				
\$ _____	\$ _____	\$ _____ Revenue - Expenses	<table border="1"> <tr> <td>Savings Contribution</td> <td>Debt Reduction</td> </tr> <tr> <td>\$ _____</td> <td>\$ _____</td> </tr> </table>	Savings Contribution	Debt Reduction	\$ _____	\$ _____
Savings Contribution	Debt Reduction						
\$ _____	\$ _____						

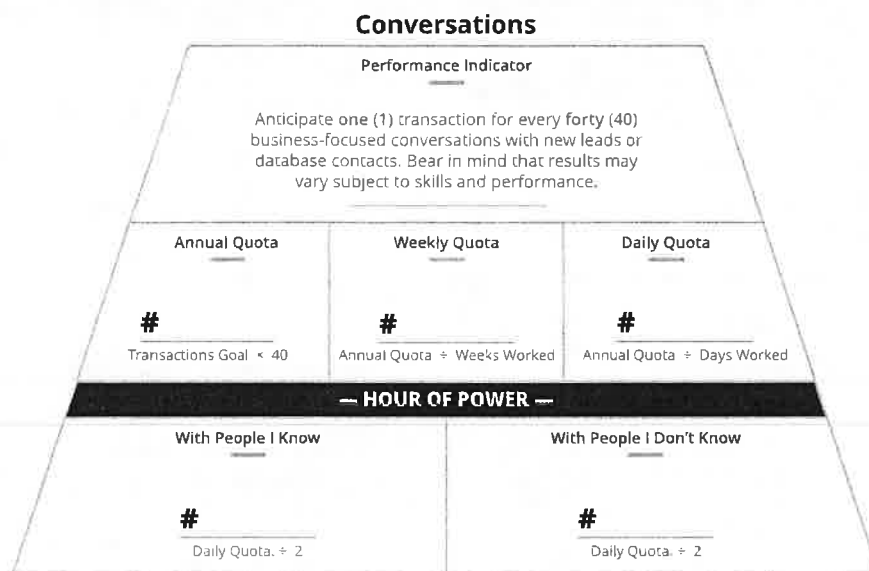
Transactions Goal:

How many transactions must I close to reach my income goal?

Sellers			Buyers			Leases	
Portion of Revenue	Average Sale Price	Average Commission	Portion of Revenue	Average Sale Price	Average Commission	Portion of Revenue	Average Commission
% _____	\$ _____	\$ _____	% _____	\$ _____	\$ _____	% _____	\$ _____
Total seller transactions:	# _____		Total buyer transactions:	# _____		Total lease transactions:	# _____
Total listings taken:	# _____		Total buyer appointments:	# _____		Total lease appointments:	# _____
Total listing appointments:	# _____						

Conversations Goal:

How many conversations must I conduct to reach my transactions goal?



When It Happens

Optimal Day:

What does my perfect day look like to carry out this plan?

Time	Activity Description
4 AM	•
5 AM	•
6 AM	•
7 AM	•
8 AM	•
9 AM	•
10 AM	•
11 AM	•
12 PM	•
1 PM	•
2 PM	•
3 PM	•
4 PM	•
5 PM	•
6 PM	•

EXPENSE TRACKER

Personal Expenses:

What is the carrying cost to operate my life?

Expenses	CY Monthly Cost	CY Annual Cost	FY Monthly Cost	FY Annual Cost	Notes
Child Care	\$	\$	\$	\$	
Child Tuition	\$	\$	\$	\$	
Debts - Back Taxes	\$	\$	\$	\$	
Debts - Credit Card(s)	\$	\$	\$	\$	
Debts - Household	\$	\$	\$	\$	
Debts - Legal	\$	\$	\$	\$	
Debts - Medical	\$	\$	\$	\$	
Donations	\$	\$	\$	\$	
Dry Cleaners/Laundry	\$	\$	\$	\$	
Groceries	\$	\$	\$	\$	
Health Supplies/Supplements	\$	\$	\$	\$	
Household Supplies	\$	\$	\$	\$	
Insurance - Auto	\$	\$	\$	\$	
Insurance - Health	\$	\$	\$	\$	
Insurance - Home	\$	\$	\$	\$	
Insurance - Life	\$	\$	\$	\$	
Investments Account(s)	\$	\$	\$	\$	
Loans - Bank(s)	\$	\$	\$	\$	
Loans - Mortgage(s)	\$	\$	\$	\$	
Loans - Personal	\$	\$	\$	\$	
Loans - Student	\$	\$	\$	\$	
Loans - Vehicle(s)	\$	\$	\$	\$	
Personal Coaching	\$	\$	\$	\$	
Personal Gifts	\$	\$	\$	\$	
Personal Hygiene/Care	\$	\$	\$	\$	
Personal Rent(s)	\$	\$	\$	\$	
Personal Subscriptions	\$	\$	\$	\$	
Personal Taxes	\$	\$	\$	\$	
Personal Travel	\$	\$	\$	\$	
Pets	\$	\$	\$	\$	
Restaurants	\$	\$	\$	\$	
Utilities - Cable/Internet	\$	\$	\$	\$	
Utilities - Gas/Electric	\$	\$	\$	\$	
Utilities - Phone(s)	\$	\$	\$	\$	
Utilities - Trash/Recycling	\$	\$	\$	\$	
Utilities - Water	\$	\$	\$	\$	
Vehicles - Gasoline	\$	\$	\$	\$	
Vehicles - Parking/Tolls	\$	\$	\$	\$	
.	\$	\$	\$	\$	
Sum Total	\$	\$	\$	\$	

CY (Current Year) • FY (Future Year)

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EXPENSE TRACKER

Professional Expenses:

What is the carrying cost to operate my business? .

Expenses	CY Monthly Cost	CY Annual Cost	FY Monthly Cost	FY Annual Cost	Notes
Agent Dues/Fees	\$	\$	\$	\$	*
Business Gifts	\$	\$	\$	\$	*
Business Taxes	\$	\$	\$	\$	*
Business Travel	\$	\$	\$	\$	*
Debts - Back Taxes	\$	\$	\$	\$	*
Debts - Credit Card(s)	\$	\$	\$	\$	*
Debts - Legal	\$	\$	\$	\$	*
Education/Seminars	\$	\$	\$	\$	*
Loans - Bank(s)	\$	\$	\$	\$	*
Loans - Mortgage(s)	\$	\$	\$	\$	*
Loans - Vehicle(s)	\$	\$	\$	\$	*
Office Rent	\$	\$	\$	\$	*
Office Supplies/Equipment	\$	\$	\$	\$	*
Overhead/Salaries	\$	\$	\$	\$	*
Splits - Company	\$	\$	\$	\$	*
Splits - Referral(s)	\$	\$	\$	\$	*
Splits - Team	\$	\$	\$	\$	*
Technology/Software	\$	\$	\$	\$	*
Utilities - Cable/Internet	\$	\$	\$	\$	*
Utilities - Gas/Electric	\$	\$	\$	\$	*
Utilities - Phone(s)	\$	\$	\$	\$	*
Utilities - Trash/Recycling	\$	\$	\$	\$	*
Utilities - Water	\$	\$	\$	\$	*
*	\$	\$	\$	\$	*
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*	\$	\$	\$	\$	*
*	\$	\$	\$	\$	*
*	\$	\$	\$	\$	*
Sum Total	\$	\$	\$	\$	

CY (Current Year) • FY (Future Year)

