# AI‑Powered Financial Planner for Solopreneurs

## Vision Statement (1–2 sentences)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Monthly Revenue Goals (Quarter Snapshot)

|  |  |  |
| --- | --- | --- |
| Month | Target | Actual |
| Month 1 | \_\_\_\_\_\_\_ | \_\_\_\_\_\_\_ |
| Month 2 | \_\_\_\_\_\_\_ | \_\_\_\_\_\_\_ |
| Month 3 | \_\_\_\_\_\_\_ | \_\_\_\_\_\_\_ |

## Core Offer Summary

Describe your primary product or service in one sentence.

## Financial Snapshot

|  |  |  |  |
| --- | --- | --- | --- |
| Startup Budget | Cost | Operating Costs | Monthly |
| Website | \_\_\_\_\_\_\_ | Software | \_\_\_\_\_\_\_ |
| Tools | \_\_\_\_\_\_\_ | Hosting | \_\_\_\_\_\_\_ |
| Marketing | \_\_\_\_\_\_\_ | Other | \_\_\_\_\_\_\_ |
| Total | \_\_\_\_\_\_\_ | Total | \_\_\_\_\_\_\_ |

## Income Streams

[ ] Digital Products  
[ ] Coaching/Consulting  
[ ] Affiliate Income  
[ ] Memberships  
[ ] Ads/Sponsorships

## AI Tools You’ll Use (Top 3–5)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## 30‑Day Launch Plan

|  |  |
| --- | --- |
| Week 1 | Key tasks: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Week 2 | Key tasks: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Week 3 | Key tasks: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Week 4 | Key tasks: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Success Metrics (KPIs)

[ ] Revenue  
[ ] Email Subscribers  
[ ] Website Traffic  
[ ] Leads/Clients