



# Branch Goals & Expectations Worksheet

Financial Institution: \_\_\_\_\_ Date: \_\_\_\_\_

Branch: \_\_\_\_\_ Prepared by: \_\_\_\_\_

## Please Share Your Goals Below:

Please describe monthly/annual deposit goals.

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Please describe monthly/annual loan goals.

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Please describe your monthly/annual fee income goals, such as ATM fees & non-interest income.

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Please describe any other goals.

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Please share any best practices or challenges you may have with your in-store branch(es).

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Additional areas you would like for me to focus on with your teams.

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Please note: In lieu of a branch consultation, you may opt for one of our training workshops, please contact your training consultant for more information.