



Branch Goals & Expectations Worksheet

Financial Institution: _____ Date: _____

Branch: _____ Prepared by: _____

Please Share Your Goals Below:

Please describe monthly/annual deposit goals.

Please describe monthly/annual loan goals.

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

Please describe any other goals.

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

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

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.