



Basic Planning Outline

1. Finances

- A. How much do you need to cover life bills? (monthly) _____
- B. How much do you need to cover private practice expenses (monthly) _____
- C. How many clients do you need to see per month to cover the combination of those? _____
- D. How many months can your savings cover these expenses? _____
- E. How/when/what will you pay yourself? _____

2. Getting Clients

- A. Have you selected a niche? _____
- B. What 5 marketing strategies are you willing to do well (using best practices, not just shooting from the hip)
 - 1. Great website
 - 2. Networking
 - 3. _____
 - 4. _____
 - 5. _____
- C. Branding- does your marketing feel like you & your clients? _____

3. Logistics

- A. Online? Where/what? _____
- B. What practice management system? We love TherapyNotes®. _____

We teach all this and more at abundanceparty.com so if you feel stuck on any of it, we have your back.