

Individual Success Plan/Investment Sheet

Name:Major/minor						
C	Calendar Year: 20	Semester (circle one):	FALL	SPRING	SUMMER	
I	plan to earn a Bachelor's D	egree from Xavier University (ci	ircle one):	YES NO		
ı	plan to transfer from Xavie	r University to another school p	orior to earı	ning my Bachel	or's Degree (circle one): YE	s no
1.		c goal(s) is to:				
		do to make your goal happen? _				
2.	This semester my personal	goal(s) is to:				
		do to make your goal happen?				
3.	This semester my profession	nal goal(s) is to:				
		do to make your goal happen? _				
4.	This semester my financial	literacy goal(s) is to:				
5.	During my time at Xavier U	niversity my goal is:				
	5.1 What are you going to o	do to make your goal happen? _				
6.	After Xavier University my §	goal is:				
	6.1 What are you going to o	do to make your goal happen? _				
7.	Employment:	If yes, where?et a job? Yes No				

Xa	vier ID #						
8. Tl	nis semester, I would like to (Check all that	pply)					
	☐ Improve my study skills	mprove my note to	prove my note taking skills Improve my time managemen			ills	
	☐ Improve my reading comprehension ☐	mprove my math s	prove my math skills				
	☐ Improve my writing skills	mprove Grade Point Average Reduce math/test anxiety mprove my decision making Prepare for graduate school ind a major and/or minor Improve my job search skills mprove my leadership skills Improve my financial literacy					
	Develop a graduation plan						
	Participate in cultural events						
	Explore careers						
Get assistance with my FAFSA Meet people/m			friends [Develop a resu	me		
	Participate in Tutoring (list subjects)						
	Other (specify)						
9.	What could prevent you from achieving yo	r academic goals t	his semester? (Check all that ap	ply)		
	☐ Working/Job ☐ Lack of Fam	ly Support 🔲 Mis	ssing or Tardy to	o Class 🔲 Mo	oney Concerns		
	☐ Lack of Self-confidence ☐ Difficult Cla	☐ He	alth Concerns				
	Easily Distracted Procrastina	k of Motivation	vation Lack of Technology Skills				
	Unsure of College Process Afr	id to speak up or as	k questions in o	class Disabil	ity		
	Other (please specify)						
Ī	Date Requirement/Assignmen	Date Requirement/Assignment					
	Signature	Signature					
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Fall Semester Minimum Requirements	Spring Semester Minimum Requirements
Intake meeting with TRIO AdvisorTRIO College Success Seminar SeriesTRIO event (Lunch N Learn, Grab Bag Wednesday's etc.) A Financial Literacy workshop/seminar Mid-Semester Check-In meeting with TRIO Advisor End of Semester meeting with TRIO Advisor	 Check in meeting with TRIO Advisor TRIO College Success Seminar Series TRIO event (Lunch N Learn, Grab Bag Wednesday's, etc.) A Financial Literacy workshop/seminar Mid-Semester Check-In meeting with TRIO Advisor End of Semester meeting with TRIO Advisor
Please note the list above displays MINIMUM requirements. TRIO Adevelop a meeting plan with your advisor at the first meeting of the	· · · · · · · · · · · · · · · · · · ·

Xavier ID #_____

End of Semester meeting with TRIO Advisor	End of Semester meeting with TRIO Advisor
develop a meeting plan with your advisor at the first meeting of th	goals and academic plan. You understand that if you choose not to
Student Signature	Date
TRIO Advisor Signature	Date