

Live Financially Well: Your Prosperity Roadmap

- Why is your personal financial well being important to you?

- How would you define financial stability & security?

- What would it mean to BE financially stable & secure?

- Our current money mindset is influenced by our past. Describe the economic reality growing up.

- What money roles did you see growing up? Did your parents/caregivers communicate about money? If so, what was that like?

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- What were some of the beliefs & lessons around money you learned growing up?

- How did your parents/caregivers handle money?

- What do you want to repeat?

- What do you NOT want to repeat?

- What money mistakes of my own do I need to let go of?

- What are the emotions I associate with money?

- Do I feel in control of my money? Why or why not?

Live Financially Well: Your Prosperity Roadmap

- Spender/Saver:

- Nerd/Free Spirit:

- Safety/Status:

- Experiences/Things:

- Quality/Quantity:

- Abundance/Scarcity

- Planned/Spontaneous:

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- What am I doing well on my financial journey?

- Where can I improve?

- When it comes to the personal & relational side of money, where can I improve? Am I living my values & expectations? Am I setting appropriate boundaries? Am I communicating effectively with my partner? Do I compare myself to other people instead of living my own life?

- How do emotions impact my relationship & decisions around money?

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- What are my life & money values?

- What is my financial vision?

- Where am I now and where do I want to be?

- WHY is this important?

- Financial Goal Statement: (specific, measurable, time limited)

- How do I get there? What is standing in my way? These are your Action Items (ex: doing a budget)

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- Action creates change. After I clarify my goals, I can clarify my plan to get there.
- I am in control of my money & decide where it goes. I cannot change what I don't know.
- I know where my money is going through a
 - Budget
 - Personal spending & savings plan
 - Prosperity plan
- A budget is:
 - Your spending & saving plan
 - Clarity on your numbers
 - Insight on what's important & not important
 - Adjustable based on your goals
- Setting up my zero-based budget:
 - Income (net) minus expenses = ZERO
 - Assign every dollar somewhere
 - My budget is based on MY priorities
 - Expenses will include essentials, needs, wants & goals

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- How can budgeting, paying down debt & having an emergency fund help move me forward on my financial journey?

- What is my plan to be intentional in my spending & saving?

Winning Habits: How can I cultivate these in my own life?

- Lose the guilt
- Focus & intention
- Live your life
- Gratitude & Contentment
- Minimalist Mindset
- Millionaire Mindset
- Protecting wealth
