

Milestone 1

Milestone Book Selection

- The Richest Man in Babylon* by George S. Clason

Management

Your Financial Filing Cabinet

- Make a list of all of your current financial accounts: bank accounts, credit cards, personal loans, car loans, student loans, mortgages
- Set up digital files for each of these accounts
- Download most recent statements and store in appropriate files
- BONUS: Download and store all statements for the current year

Average Monthly Expenses

- Make a list of all of your current spending and savings accounts
- Print 6 months of statements from all accounts you spend from
- Create your master list of expense categories
- Determine averages: Easy, Time Consuming, Hard
- Debt minimums! (student loan exception)
- Baseline - Forecast I

Net Worth

- Make a list of all assets
- Make a list of all debts

Financial Tracking System

- Select spreadsheet or software
- Link up bank accounts
- Start tracking, being sure to utilize ONLY categories on your master list!
- Create calendar notifications - daily or weekly to correctly categorize transactions

Mindset

- Money Mindset - Understanding the Brain
- Craft your personal power statement
- Pain Power Cycle Practice

Making More

- Current earnings baseline - sideline work
- Creative earnings - Record 5 years worth of earnings

Pit Stop

- Financial tracking system coaching/support

MAINTENANCE

- Monthly date to download and file financial statements
- End of month tracking clean up and expenses review + reconciling software with bank accounts
- Write and/or speak your Personal Power Statement (along with any additional mantras) on a daily basis

Milestone 1 Achieved - Clarity Island

Milestone 2

Milestone Book Selection

- Essentialism: The Disciplined Pursuit of Less* by Greg McKeown
- Bonus - *Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones* by James Clear

Management

- Define Your Current Life Zones
 - Vision
 - Goals
 - Tasks

- Time Tracking System
- 90 - 120 Day Plan

- Finding Jumpstart Money
- Identify planned savings categories and total
- Set up Your Debt Plan
- Set up Your Wealth Plan
 - Open high interest wealth account & planned savings

- Forecast II
- Your Money Map

Mindset

- Financial Relationship Commitment - what are your “vows”?
 - Understanding elements of a negative financial relationship
 - Understanding elements of a positive financial relationship
- Identify and acknowledge your current financial beliefs

Making More

- Revenue Model
- Revenue Brainstorming Exercise

Pit Stop

- GoodBudget to track danger categories
- Debt assistance options
- Increasing Cashflow - Creating Cashflow Program

MAINTENANCE

- Weekly time map - scheduling target tasks from each zone
- Monthly Money Map Update
- Quarterly forecast and tracking review
- Annual net worth update

Milestone 2 Achieved - Action Island

Milestone 3

Milestone Book Selection

- The Simple Path to Wealth: Your Roadmap to Financial Independence and a Rich, Free Life* by JL Collins
- Bonus - *Quit Like a Millionaire: No Gimmicks, Luck or Trust Fund Required* by Kristy Shen & Bryce Leung

Management

Investing

- Open your IRA
- Select investment strategy and contribution timing

Estate Planning

- Account for your family's needs
 - Ensure appropriate insurance coverage
 - Name a guardian for your children
 - Document wishes for your children's care
 - Make sure all legal documents are accessible to family
- Establish your directives
 - Create your trust or will
 - Medical care directive
 - Power of attorney
- Review your beneficiaries on all policies and accounts

Build Financial Team (as needed!)

- CPA / Tax Professional
- Estate Attorney
- Certified Financial Professional and/or Investment Advisor (probably only needed with significant estate)

Mindset

- Complete your Money Mindset Toolkit
- Commit to ongoing mindset work through daily reading, listening and active practice (See recommended resource list)

Making More

- Personal strategy for ongoing revenue growth
- Personal strategy for charitable contributions of time and/or money

Pit Stop

- Building community - accountability partner(s)

MAINTENANCE

- Utilizing daily, weekly, monthly, quarterly, annual financial habits checklist

Milestone 3 Achieved - Growth Island