

Life is too short to drink cheap champagne

Blueprint to Financial Success

In order to create financial wealth, you have to identify “how did you get where you are financially”. Most financial behaviors are learned as children.



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PART ONE

How Did You Get Here?

Childhood Memories

In order to create financial wealth, you have to identify “how did you get where you are financially”. Most financial behaviors are learned as children. We often “inherit” our parents’ behavior around money.

Some common behaviors are: 1) parents never talked about money; parents lived miserly; 3) parents over spent; parents never invested; parents separated and/or divorced.

Exercise:

List two early childhood memories surrounding money. Give each example a “Title.”

What behaviors did you learn?

Is the memory accurate?

How would others who were involved in this event remember the event?

What behaviors did you adopt as a result of this?

PART TWO

Where Am I Now?

Cash Flow Spending Plan

Before you can get started on your road to financial success, you have to know where you are now. Use the Cash Flow Spending Plan to chart your monthly income and spending.

What changes do you need to make? List them below.

PART THREE

Where Am I Going and Why?

Now, this is the fun part. Use the List the things you would like to accomplish and why.