



## **Self-Directed** (with Accountability)

### **13-Week Financial Foundations**

Our animated crew gives you **WEEKLY** direction and encouragement for 13 weeks as you learn key concepts and an **industry-leading process** for building a healthy financial foundation.

The real, live, caring **professional financial coach assigned to you** helps you stay accountable and on track. Once you're done the lessons, you will meet with this coach for 45 minutes to get questions answered and build your Growth Plan.

Join this fun, engaging, and life-transforming program today!

This is a slower-paced, self-directed, secure email-based experience designed to create real, lasting change for people who are ready to take control of their money and their future.

Through a blend of engaging videos (or transcripts), meaningful activities, reflection questions, and support from a professional financial coach, you'll dig deep into how to:

- 💰 Build healthy, lasting money habits
- 🎯 Align your finances with your values and goals
- 💡 Master practical skills for saving, spending, debt elimination, and wealth building
- 💪 Strengthen your financial foundation for long-term success

This program gives you the time and space to think, apply, and grow — at your own pace — while being guided every step of the way. By the end, you'll feel stronger, smarter, and fully equipped to experience what healthy finances can do for your confidence, your freedom, and your peace of mind.



#### **Week 1**

- 1) Introduction
- 2) Financial Resiliency
- 3) Financial Snapshot (Net Worth)

#### **Week 2**

- 4) Financial Capacity (Income)
- 5) Needs & Wants (Expenses)

#### **Week 3**

- 6) Core Values
- 7) Financial Wellness
- 8) SMARTER Goals

#### **Week 4**

- 9) Your WHY
- 10) Priority List

#### **Week 5**

- 11) Emergency Fund
- 12) Sinking Funds
- 13) Opportunity Cost (Compound Interest)

#### **Week 6**

- 14) Cashflow (Order of Operations)
- 15) Spending Plan (Irregular Income)

#### **Week 7**

- 16) Tracking
- 17) Reconciling
- 18) Fraud (Identity Theft)

#### **Week 8**

- 19) Buying a Vehicle
- 20) Debt Mindsets

#### **Week 9**

- 21) Get Out of Debt
- 22) Debt Elimination Plan

#### **Week 10**

- 23) Having Good Credit (Credit Score)
- 24) Wealth Partners

#### **Week 11**

- 25) #1 Budget Buster (Food)
- 26) Buying a Home
- 27) Investing Basics

#### **Week 12**

- 28) Personalities & Money
- 29) Boundaries

#### **Week 13**

- 30) Your Giving Plan (Generosity)
- Book Your Private Coaching Call