



# Self-Directed (with Accountability)

## 30-Day Financial Foundations

Get **DAILY** direction and encouragement as you work through this 30-day bootcamp to 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 fast-paced, self-directed, secure email-based experience built for people who are ready to take bold action and turn their financial goals into reality — starting now!

Each day, you'll receive an interactive lesson packed with engaging videos (or transcripts), practical exercises, reflection questions, and support from a professional financial coach. You'll uncover how to:

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

This is your month to get focused, take action, and prove to yourself what's possible. By the end of the challenge, you'll feel stronger, smarter, and more confident — with the clarity and skills to experience what healthy finances can truly do for your life.

### 📌 **Discovery**

- 1) Introduction
- 2) Financial Resiliency
- 3) Financial Snapshot (Net Worth)
- 4) Income
- 5) Needs & Wants (Expenses)
- 6) Core Values
- 7) Financial Wellness

### 🎯 **Refocus**

- 8) SMARTER Goals
- 9) Your Why
- 10) Priority List

### 🔥 **Gain Control**

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

### ⚖️ **Set a Plan**

- 14) Cashflow
- 15) Spending Plan (Irregular Income)
- 16) Tracking
- 17) Reconciling

### 🌱 **Build Capacity**

- 18) Identity Theft
- 19) Buying a Vehicle

### 🔥 **Gain Control**

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

### 🌱 **Build Capacity**

- 23) Having Good Credit (Credit Score)
- 24) Wealth Partners
- 25) #1 Budget Buster (Food)
- 26) Buying a Home
- 27) Investment Basics
- 28) Personalities & Money
- 29) Boundaries
- 30) Generosity

### 📅 **Day 31**

Book Your Private Coaching Call

### 🎉 **Grand Prize Draw**

Held Nov 1 of each year (to kick off Financial Literacy Month in Canada)