

Module 1

**WHAT ABOUT MONEY IS
IMPORTANT TO YOU?**

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Introduction

- Money and wealth has a different meaning for everyone
- For some, simply paying the bills is more than enough. For others, leaving a legacy is the ultimate goal over and above paying monthly expenses
- Whatever your ambitions are, or the goals that you hope to reach, money can be an important tool in your arsenal



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Module Outline

- Section 1.1: Money as a Tool
- Section 1.2: Identify your, "Why?"
- Section 1.3: How Money Drives your Goals

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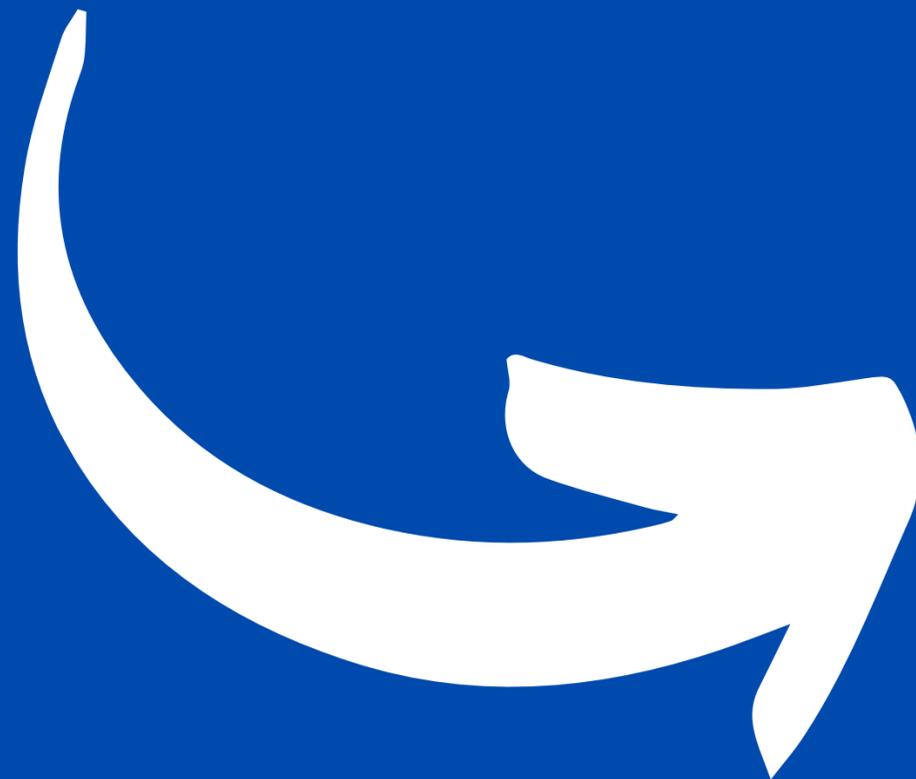
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Let's get started!



Section 1.1

Money as a Tool

- Money is a tool, not the objective
- How can we use that tool to accomplish our goals?
- Efficiently managing the use of that tool



Section 1.1

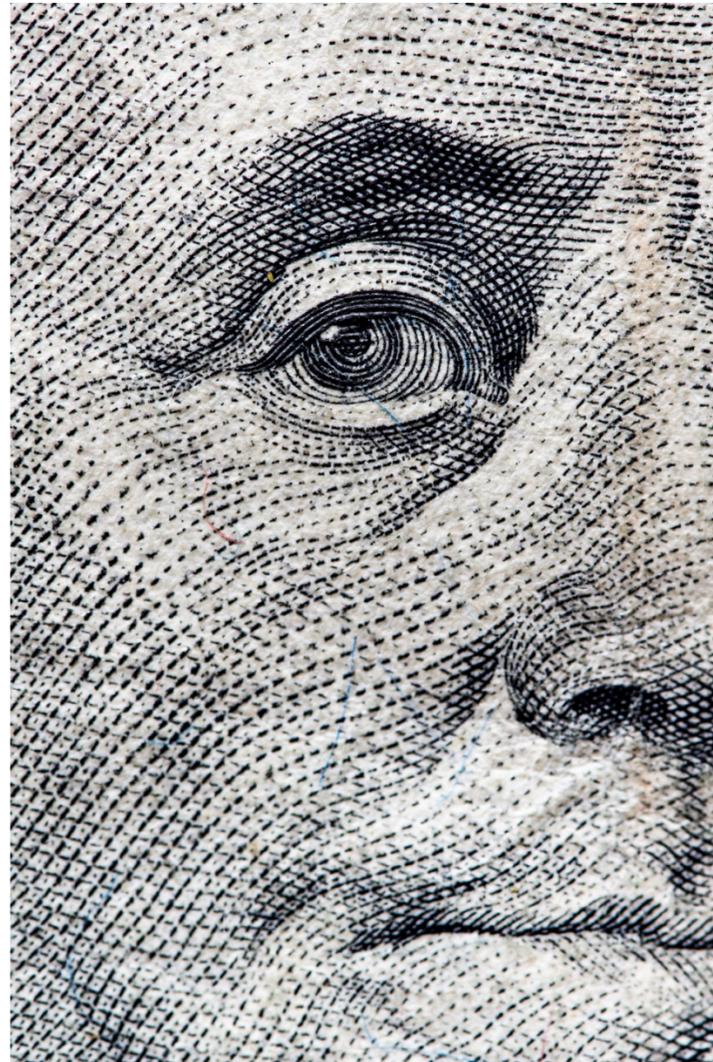
Money as a Tool



- Organization is key to using your money efficiently
- Keeping track of your finances and budgeting effectively
- Budgeting tools like www.mint.com

Section 1.1

Money as a Tool



- Each dollar should have a job
- No expense goes unaccounted for
- Gives you "permission" to spend money

Section 1.2

Identify your, "Why?"



- Everyone has a "Why"
- Deeper than "Financial Freedom"
- Your "Why" drives your decisions

Section 1.2

Identify your, "Why?"

- Your "Why" should be very specific
- What gets you up in the morning?
- Buying a home, getting married, having kids, etc.



Section 1.2

Identify your, "Why?"

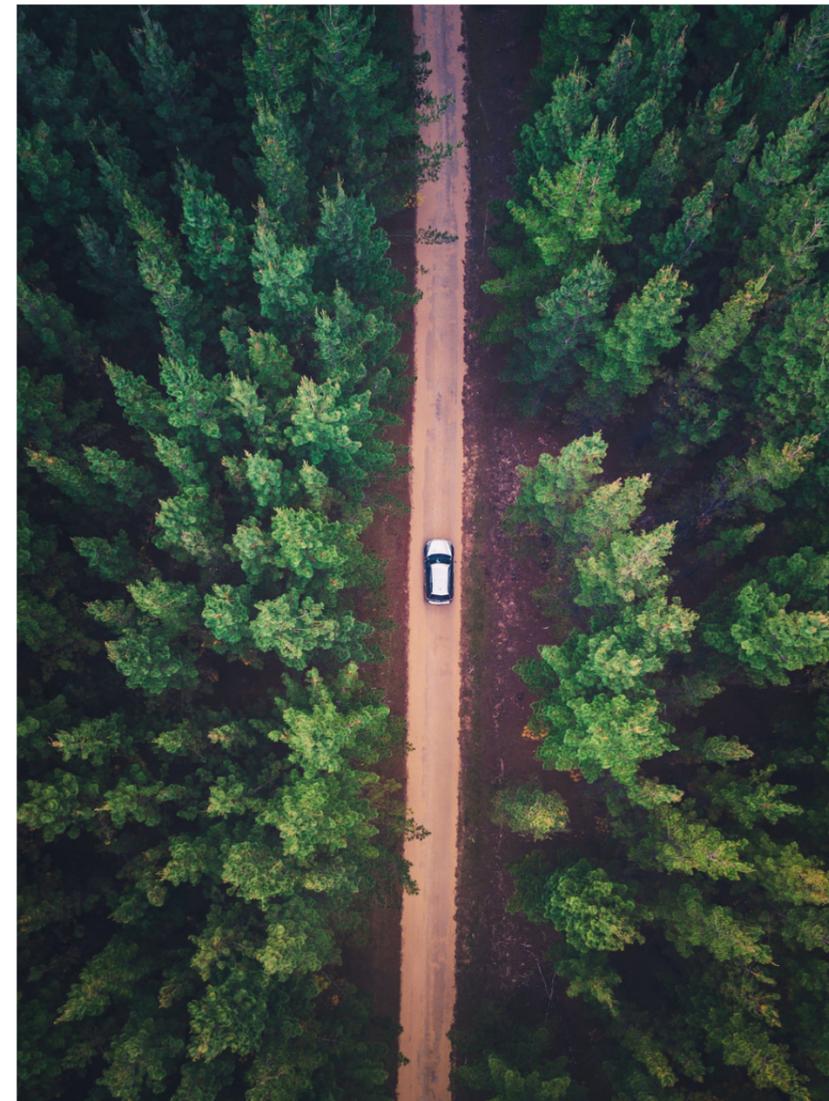


- Specific goals lead to specific outcomes
- "Why" statements should not be ambiguous

Section 1.3

How Money Drives your Goals

- Think about the things that are most important to you
- Family? Philanthropy? Career?



Section 1.3

How Money Drives your Goals



- Go deeper!
- Creating a foundation and leaving a legacy
- Apply your "Why"

Conclusion

- Reframing your mindset to think of money as a tool to accomplish your goals is a necessary part of financial planning
- Giving every dollar a job to do helps us stay focused
- Articulating your “Why” and identifying what is most important to you, makes your goals real and solidifies your commitment to your plan later

Congratulations on Completing Module 1!



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