90-DAY WEALTH COACHING PROGRAM

THE STEP-BY-STEP CLIENT EXPERIENCE

01: SIGN CLIENT AGREEMENT

This makes all financial informatlon and communication with your Wealth Coach strictly confidential -- Just like when you see your doctor.

02: COMPLETE CLIENT SURVEY

It helps your Wealth Coach get to know you and learn about your financial goals. It can be completed right from your cell phone.

03: CONNECT FINANCIAL ACCOUNTS

Sync all of your financial accounts to our secure client portal so that your Wealth Coach can understand your financial situation. You'll have access to the portal after the program ends so you can continue to see the big picture and track your progress.

04: RECEIVE FINANCIAL GAME PLAN

Your Wealth Coach will crunch the numbers and take your personal preferences and goals into account. Then they'll present you with an analysis of your current financial situation and recommendations on what you can do to improve.

05: SCHEDULE VIDEO CHAT

You'll have one-on-one time with your Wealth Coach to review your Financial Game Plan and ask any questions that you have.

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MONEY BOSS VIDEO SCHEDULE

A 90-SECOND VIDEO SENT TO YOUR PHONE EVERY WEEKDAY

Week 1

Overview of banking products like checking savings, and CDs -- and how you can find the best ones; why you need a F*ck It Fund plus the Ideal way to set one up.

BANKING

Week 2

Traditional budgeting doesn't work. We'll show you a better way to budget, how your paychecks should be allocated, plus hacks to make It all happen with mlnlmal effort.

BUDGETING

Week 3

We'll discuss why credit is important, how to boost credit score, where to find the best credit cards, and a tool to prevent you from overspending.

CREDIT

Week 4

Rules of thumb for adjusting your repayment schedule, and paying off loans faster plus an overview of loan foigiveness, consolidation, and refinancing.

STUDENT LOANS

Week 5

Explanation of how our tax system works, how marriage, investing and self-employment affects taxes, plus tax breaks you can take advantage of.

INCOME TAX

Week 6

Why Investing Is the only way you'll reach your goals and why it's nothing like gambling, plus overviews of stocks, bonds, currencies and commodities.

INVESTING PART 1

Week 7

Deeper dive Into investing including: alternative investments. diversiftcatlon, mutual funds, ETFs. roboadvisors, and online brokers.

INVESTING PART 2

Week 8

How much money you'll need to retire and what you need to do to get there plus a comparison of Traditional and Roth 401(k)s and IRAs

RETIREMENT

Week 9

Deciding whether you should rent or buy, how to prepare for a future home purchase, and an overview of mortgages.

REAL ESTATE

Week 10

Why you shouldn't pay attention to the news, what all those fancy finance terms mean, and a quick overview of the world's economic history.

ECONOMICS

Week 11

Everything you need to know to keep making progress after our program ends plus an overview of estate planning & insurance.

TRACKING SUCCESS

Week 12

Q &A

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