

# THE HIGH PERFORMANCE PATH TO FINANCIAL FREEDOM

Follow the path to financial freedom to help you build lasting wealth.



## STAGE 1

## STABILITY

- ✓ Create a home budget
- ✓ Pay down debt
- ✓ Build a 1-month cash reserve

## STAGE 2

## SUCCESS

- ✓ Pay off debt
- ✓ Increase home equity & retirement saving
- ✓ Build a 6-month cash reserve

## STAGE 3

## SIGNIFICANCE

- ✓ Structure your business for active retirement
- ✓ Develop a financial legacy for your family and community.
- ✓ Mentor others in the millionaire mindset



# 30-DAY FINANCIAL ASSESSMENT

MY NAME: \_\_\_\_\_

TODAY'S DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## WEEK 1 - TAKING ACCOUNT

- List all your account numbers and balances
- Compile all passwords, PINs and log-ins and put in a safe place
- List all debt (other than real estate) with balances, interest rates and payments

## WEEK 2 - ARE YOU COVERED?

- Assemble all insurance policies
- List beneficiary amounts and premium payments
- List total amount of any cash balances/surrender value

## WEEK 3 - RETIREMENT ANALYSIS

- List total value of 401K or SEP accounts
- List total value of any other retirement vehicles
- Analyze 12-month history of retirement investment ROI

## WEEK 4 - REAL ESTATE AND MORE

List all your real estate holdings, including:

- Monthly payment and interest rate
- Loan balance
- Approximate current value
- Equity on each property
- Use a finance management software to simplify and track (like mint.com)
- Add all accounts to your “favorites” tab in your internet browser