

FINANCIAL LITERACY

IT'S LIT TO BE FINANCIALLY FREE

Now that we've completed your 1 on 1 financial discovery; time for the next step. Here's a summary of our discussion, along with a few follow-up items. You've made the first step, now let's put some action behind it!

1. Money Mindset

2. Money Relationship Discoveries

3. Financial Goals

4. Client Homework

5. Next Steps



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The best thing money can buy is financial freedom. As your financial specialist, I'm here to help you build that foundation and grow your wealth. By working together, we can create a plan that fits both your short-term and long-term goals.

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