

# SO WHAT'S THE PLAN?

## PERSONAL WEALTH ACTIVATION PLAN



### WHAT TO EXPECT FROM YOUR ONE HOUR SLEEP BETTER AT NIGHT CONSULTATION

**DISCOVERY SESSION :  
1 HOUR F2F OR  
VIRTUAL (ZOOM) CALL**

**1**

**CHECK IN/SUPPORT :  
WHAT'S WORKING?  
WHAT'S NOT?**

**2**

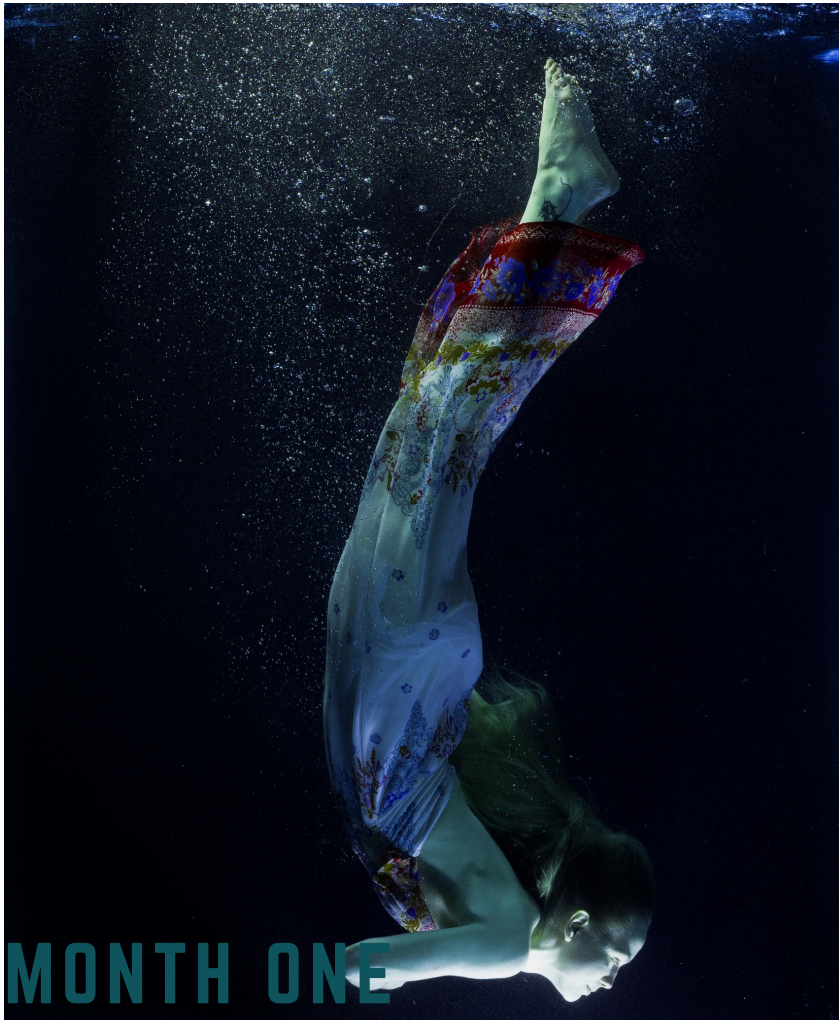
**OPTIONAL: 30 MINUTE  
MAINTENANCE CALL  
CREATING BETTER  
HABITS AND MINDSET**

**3**

## LET'S GET ACTIVATED!

Contact Me: [tonita@thewealthactivator.com](mailto:tonita@thewealthactivator.com) /484-843-1682

I'm looking forward to supporting you. I know that looking at the way we manage, think and feel about money can create anxiety, but my hope is that the emotional attachment will ease as we work toward your personal goals. Just to summarize, our first session will be a deep dive into your income and spending, current debt, short term and long term goals. We'll end up with a working budget and a plan to reduce debt. The second month I normally schedule a quick 15 minute phone or virtual check in to talk about how things are going, how you're feeling and tweak the plan and/or budget as necessary. I also offer a 30 minute maintenance consultation (an additional fee) where we will work on creating methods and habits that will help you sustain your new mindset and of course celebrate your wins and progress!



## MONTH ONE

### THE DEEP DIVE

#### BEFORE OUR SESSION:

- Gather all sources of income : Paystubs, investment income, business revenue for three months.
- List all of your household expenses : three months , using bank statements, check books and cash receipts.
- If you're comfortable with Excel and want to work on your own budget, use the [Household Budget](#) < ----- CLICK THE LINK and we can utilize the time in our first session to review your budget,
- Make a list of your current debt: This list should include the type of debt, the monthly payment, amortization schedule if applicable (a breakdown of principle and interest), the interest rate and whether it's fixed or adjustable rate, the term of the debt (this would be for loans, not credit cards) and who's responsible for the debt if it's not you (i.e if you had a cosigner or if it's only under one spouse's name and not both)
- Complete and sign the Coaching Agreement, complete the "Sleep Better At Night" and Dream exercises and confirm the date and payment for your first wealth activation appointment. Let's dive!

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*Almost every successful person begins with two beliefs; the future can be better than the present, and I have the power to make it so. ~ David Brooks*



