

# Picture Your Prosperity Webcast

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## **My declarative sentence about my goal:**

*Write this in the present tense focusing on what you desire to happen, not on what you don't want to happen. For example: My practice is full with ideal patients.*

## **My earliest money memory is:**

## **Describe your money upbringing:**

*How much was money talked about (or not talked about) when you were a child? Did you think you had a lot of money, not much? Did your parents talk to you about money? Was one parent more in charge of the money than the other? Did they fight about money?*

**What I believe about my practice is...** *Write for at least 5 minutes.*

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## Reality Check:

On a scale of 1 – 10 (1= Completely Disagree - 10= Completely Agree)

- **Investment Plan:** I am confident that my investment plan is allocated in a way appropriate for my goals.

1   2   3   4   5   6   7   8   9   10

- **Savings Rate:** I am satisfied with the amount of money I'm currently saving/investing.

1   2   3   4   5   6   7   8   9   10

- **Communications:** I communicate regularly and effectively with my spouse or life partner (life and/or business) about money (if applicable.)

1   2   3   4   5   6   7   8   9   10

- **Insurance:** I am confident the insurance I have (health, disability, life, home, auto, etc.) would adequately protect me if needed.

1   2   3   4   5   6   7   8   9   10

- **Estate Planning:** I have a will/estate plan that is complete and up-to-date.

1   2   3   4   5   6   7   8   9   10

**What are you grateful for:**