

by
Ellen Rogin, CPA, CFP®



Creating Your Prosperity Map

by

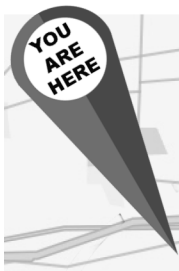
Ellen Rogin, CPA, CFP®

This guide is available at special discounts and can be created to specification when purchased in bulk for educational use. For details, contact:

Create Great
Ellen Rogin
1780 Ash Street, Suite 200
Northfield, IL 60093
(847) 716-7792
ellen@ellenrogin.com

No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or any information storage and retrieval system without written permission from the author.

Copyright © 2018 Ellen Rogin. All rights reserved.



BUILDING YOUR PROSPERITY MAP

Where are you now?

On a scale from 1–5 with 1 = far from ideal and 5 = right where I want to be

1. Relationships:

- a. Family _____
- b. Friends _____
- c. Community _____
- d. Co-Workers _____
- e. Clients _____
- f. Professional Network _____

2. Health:

- a. Physical Health
 - i. Eating _____
 - ii. Sleeping _____
 - iii. Exercise _____
- b. Mental Health
 - i. Stress Level _____
 - ii. Ability to Focus _____

3. Business:

- a. Number of Clients _____
- b. Perfect Fit Clients _____
- c. Revenue _____
- d. Profitability _____
- e. Work Environment _____
- f. Support/mentoring/coaching _____
- g. Enjoyment Level/I love what I do _____

4. Personal Development

- a. Learn New Things _____
- b. Grow as a Person _____
- c. Make time for reading/podcasts/audio books _____

5. Contribution:

- a. Financial Generosity _____
- b. Volunteer _____
- c. Pro-Bono Work _____
- d. Support Others in Their Success _____



Describe what's less than excellent right now ...

Professionally: business, clients, team support, etc.

Personally: relationships, health, home, stress, etc.

Describe what's going great right now ...

Professionally

Personally

Where do you want to expand, grow, learn?

Professionally

Personally

YOUR PROSPERITY MAP

STEP 1: WHERE do you want to go?

Consider:

What do you really really want your life to look and feel like?

Where do you live?

What are you doing?

Who is there with you?

How are you showing up in the world?

How do you feel?

Vision

Describe life 3 years from now (write in present tense - e.g. I am... I live... I have... I feel...)

... and wouldn't it be cool if ...

Now pick 3 Priority Goals (write in present tense - e.g. I have... I earn ... I am ...):

1. _____
2. _____
3. _____



STEP 2: WHY is this Vision important to you?

Consider for each of your 3 goals from **Step 1**:

How will this serve you personally? Emotionally? Financially? Spiritually?

How does reaching this goal serve others?

Who else will benefit as your vision becomes a reality?

How does each Goal serve me & others?

<u>Goal</u>	<u>Why important?</u>	<u>Who Else Benefits?</u>
<i>e.g. run a marathon</i>	<i>improve health, nicer to be around</i>	<i>raise \$ for charity, inspire my kids</i>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

STEP 3: HOW will I get there?

Consider:

Who is my ideal client?

How can I use generosity to build my business?

How can I build the right support network?

Does my mindset support my goals?

What do I believe about reaching my goals?

What one thing, if I did it on a consistent basis, would make a significant difference in my business?



MY PERFECT FIT CLIENTS*

“When you are on a journey to fulfill
your personal legend, the whole universe
conspires to help you achieve it.”

The Alchemist

#1. My Perfect Fit Client is:

List all of their qualities, characteristics, and traits:

e.g. One who wants me to work only from 9:00 am – 5:30 pm Monday through Thursday.

The number of Perfect Fit Clients I will attract over the next 12 months is: _____

* These exercises are inspired and adapted by activities in *Attracting Perfect Customers* by Stacey Hall and Janet Brogniez



#2. My Perfect Fit Client values and appreciates:

(inspired by the work of Chris West):

What my Perfect Fit Client will say about me and the value I add for them:

YOUR NAME made a difference for me by _____

What would I love people to say about the impact I made for them this year?

What do they value and appreciate?

Accomplishment	Creativity	Organization	Faith
Resourcefulness	Credibility	Frugality	Career
Independence	Decisiveness	Community	Success
Education	Love	Wealth	Style
Ambition	Logic	Practicality	Friendship
Selflessness	Perseverance	Growth	Charity
Investing	Flexibility	Happiness	Thankfulness
Experience	Making a difference	Harmony	Perfection
Balance	Dependability	Health	Fun
Spirituality	Accuracy	Honesty	Confidence
Learning	Security	Hopefulness	Winning
Family	Integrity	Discipline	Preparedness
Certainty	Energy	Humor	Prestige
Support	Attentiveness	Reputation	Privacy
Optimism	Self-reliance	Reliability	Prosperity
Freedom	Joy	Imagination	Recognition
Comfort	Expertise	Dreaming	Relationship
Thrift	Calmness	Affluence	Gratitude
Power	Stability	Self-control	Passion
Generosity	Leaving a legacy	Enjoyment	Wisdom
Consistency	Financial independence	Availability	Kindness
Contentment	Challenge	Simplicity	
Control	Teamwork	Knowledge	



MY PERFECT FIT CLIENTS*

#3. I envision my Perfect Fit Clients expect me to:

*e.g. return phone calls within 24 hours
treat them with respect and kindness
have a profitable business*

* These exercises are inspired and adapted by activities in *Attracting Perfect Customers* by Stacey Hall and Janet Brogniez



#4. What do I need to enhance (in myself, my work) to attract my Perfect Fit Clients? (use items from #3 that you're currently not doing 100% of the time)

MY GENEROSITY PLAN

“When you give good,
you live good.”

Ellen Rogin

Suggestions

Notes of encouragement/gratitude I will write each _____ (day, week, month) is _____

Volunteer hours I will give per _____ (week, month, year) is _____

Number of referrals I will give per _____ (week, month, year) is _____

Charitable donations I will make in the next 12 months: _____

Percentage of my income I'll allocate toward giving/donations: _____%

Other acts of generosity:

Mentoring

Kind acts to team members

Deep listening to friends/co-workers/clients/family

Before reacting ask “What is the most generous response I can give?”

(from The Generosity Path by Mark V. Ewert)



MY PROSPERITY MAP IN ACTION

My WooHoo Crew!

Name: _____
Email: _____ Phone: _____

Name: _____
Email: _____ Phone: _____

Name: _____
Email: _____ Phone: _____

Name: _____
Email: _____ Phone: _____

Name: _____
Email: _____ Phone: _____

Our first meeting will be: _____

Resources:

Zoom.us for video calling—free when meetings are 40 minutes or less, can share your screen

Freeconferencecall.com—free conference call numbers and ability to record calls

Suggested flow of calls:

- Calls should not last longer than 30 minutes

- Divide the time among the number of participants—someone commit to being time keeper

- Share wins since the last call, commitments for the next week, requests for support

Do take notes—so you can support each other during the week & check in on the following call.

Do intention each others' greatness—picture success for your group members.

Do start and end on time.

Do cheerlead and encourage.

Do not share unsolicited advice.



Within 30 days from today I will...

Ongoing

Each day I commit to

Consider:

Outreach calls to network, clients, COI

Meditation. Journaling. Reading. Act of Kindness

A gratitude practice (journaling, notes, calls)

Review my list of Perfect Fit Clients

Review my Prosperity Map

Each week I commit to

Consider:

Clearing clutter

Outreach calls

Volunteering or Mentoring

Meeting with my WooHoo Crew

Each month I commit to:

Consider:

Add to learning something new

Change exercise routine

Read a new book/listen to a new audio

Reviewing my goals

Review my Generosity Plan

**“When we give cheerfully
and accept gratefully,
everyone is blessed.”**

Maya Angelou