



Oola[®]

FINANCIAL WELLNESS PLANNER

FOCUS ON YOUR FINANCES

Your monthly income, spending, debts, savings and investments will dictate the kind of life you lead—including whether you eventually get what you want. So deciding what you want in your financial life is crucial.

In the boxes below, jot down what you want in the key areas of your financial life. Then, to start the process of focusing on these goals, put them in priority order by numbering each goal. What's the major financial breakthrough you want to make this year? What other goals are important to you? Write them down.

INCOME GOALS

salary or earnings, additional income, income from investments

_____	_____
_____	_____
_____	_____
_____	_____

DEBT-FREE GOALS

credit cards, student loans, auto loans, mortgage

_____	_____
_____	_____
_____	_____
_____	_____

SAVINGS GOALS

major purchase, college fund, 7-month emergency fund

_____	_____
_____	_____
_____	_____
_____	_____

SPENDING GOALS

monthly budget, expense reduction, spending review

INVESTMENT GOALS

automatic investments, retirement fund, net worth

INSURANCE GOALS

life insurance, long-term care, disability, home/auto

CHARITABLE GOALS

donations, tithing, planned giving

ESTATE PLANNING GOALS

will or trust, legacy box, final instructions

Of course, working on your personal finances is only a part of the process of creating overall balance in your life. There's also your fitness, family, career, faith, friends and fun time to consider. The key is to decide what you want in these areas, make some goals, and stay accountable to taking action daily to bring about those goals.

When you DO decide, why not use the same secret weapon that top achievers use to achieve goals: coaching. Of all the things successful people do to accelerate their path to the healthy, balanced and financially secure life they want, working with a coach is at the top of the list.

The Oola Coaching Program is the formula I've discovered that has transformed not only my life, but the lives of countless people around the world. It's based on the international bestselling book, *Oola: Find Balance in an Unbalanced World*, by Dr. Dave Braun and Dr. Troy Amdahl. This landmark 10-week coaching program will help you define the goals you want to achieve, then keep you accountable to doing those things every day that bring about the results you want.

I've even become certified as an Oola Life Coach to pace you through the program and hold you accountable for taking the actions that will get you to your goals. Together we'll face what's not working for you and create a workable plan for lowering your stress, creating life balance, having more fun, and pursuing major life goals that are important to you.

Contact me for more information. I'd be happy to jump on a 30-minute discovery call to discuss the coaching process and what you can expect from your coaching experience.