



WEALTH WORKSHOPS FOR VETERANS

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Living with Money

An introduction to understanding money and how it applies to your life, and begin communicating effectively about money.



Personalize Your Money

It all starts with getting clear on your financial goals by asking the right questions, and prioritizing your goals in order of financial success.



Work Your Wealth

It's time to get your money working for you, identify action steps to take with your wealth, and use technology to make managing money easy.





Wealth Workshops for Veterans

1. Workshop #1: Living with Money

- a. Ways to establish financial peace of mind to pursue passions
- b. Tools for anxiety, stress, worry about money
- c. Communicating about money effectively
- d. Wealth Work:
 - i. Understanding money in your life
 - ii. Learning your communication profile
 - iii. Building your balance sheet
 - iv. Write down your goals and dreams

2. Workshop #2: Personalizing Your Money

- a. Asking the right questions to make your money work for you
- b. Aligning your money with your vision and goals
- c. Prioritizing your goals in order of financial success
- d. Wealth Work:
 - i. Completing your Money Compass
 - ii. Creating your income & expense worksheet
 - iii. Learning what your credit score is

3. Workshop #3: Working your Wealth

- a. Using the Money Compass
- b. Understanding Financial Planning
- c. Applying veteran benefits to your life and wealth
- d. Wealth Work:
 - i. Identifying your wealth action steps
 - ii. Automating your money
 - iii. Using technology to support your goals