



BABY



VACATION



REMODEL



WEDDING



GRADUATION



Financial Workshops Featuring...



**THE BLUEPRINT**  
FOR FINANCIAL SUCCESS

Make Your Money Count offers financial workshops designed to help you gain the clarity and motivation to take the next step toward your financial freedom. The workshop equips each participant to create a customized “Blueprint” to aid in the financial life planning process.

“The Blueprint” uses the metaphor of building a house to help individuals, couples, and trusted friends take easy-to-follow steps that lead to financial freedom.

- The reflection questions in Section One will help you clarify your purpose (the foundation of a solid plan).
- Section Two prompts you to take a personal financial inventory (the framework of building).
- Section Three contains your financial life goals, specific next steps, and space to reflect on what it will mean to you and the people you love to accomplish your goals (the finishing stages).

The book, the workshops, and “The Blueprint” are focused on our single purpose – to help you achieve your highest hopes and dreams.

# SECTION ONE | WHAT MATTERS MOST

Consider the question: *What's important about money to you?* The workshop is designed to help you clarify your core values, purpose, and what matters most to you; "The Blueprint" helps you align all of your financial decisions with your purpose. Before your workshop begins, take a few minutes to think about how you might respond if a trusted friend asked you the following questions:

**How do finances relate to what matters most to you?**

**What are your first memories about money?**

**What is your experience, good and bad, with money and investments?**

**Who are the people you love and how does your money management affect them?**

# SECTION TWO | YOUR CURRENT FINANCIAL POSITION

This section allows you to take a personal financial inventory which includes: monthly income, expenses, and gifts; current net worth; and your monthly or annual surplus which can be used to save or invest in order to reach your financial life goals.

Assets	Current Value	Debt (Liabilities)	Amount
Cash	_____	Mortgage balance	_____
Checking accounts	_____	Credit cards	_____
Bank Savings/CD's	_____	Bank loans	_____
Retirement Accts.	_____	Car loans	_____
Investment Accts.	_____	Personal loans	_____
Education Accts.	_____	Student loans	_____
Expected Inheritance	_____	Real estate Debt	_____
Real estate/Land	_____	Business Debt	_____
Home Equity	_____	Family Debt	_____
Personal Property	_____	Other Debt	_____
Life Ins. (Cash Value)	_____		_____
Other Assets	_____		_____
<b>Total Assets:</b>	_____	<b>Total Debt:</b>	_____

Total of all assets, less total debt = Net Worth: \$ \_\_\_\_\_

Total Monthly Income: \$ \_\_\_\_\_ X12= Annual: \_\_\_\_\_

Total Monthly Expenses: \$ \_\_\_\_\_ X12= Annual: \_\_\_\_\_

Total Monthly Giving: \$ \_\_\_\_\_ X12= Annual: \_\_\_\_\_

Total Monthly Surplus: \$ \_\_\_\_\_ X12= Annual: \_\_\_\_\_

Total Monthly Investments: \_\_\_\_\_ X12= Annual: \_\_\_\_\_

Total Monthly Saving: \$ \_\_\_\_\_ X12= Annual: \_\_\_\_\_

# SECTION THREE | YOUR FINANCIAL GOALS

During the workshop, you are encouraged to share your financial life goals with a trusted friend. Use as much space as needed to write your goals. Your workshop leaders will be available to help you “crunch the numbers” if you want to make them more clear, measurable, and achievable.

List your top three financial life goals.

Goal: \_\_\_\_\_

Goal: \_\_\_\_\_

Goal: \_\_\_\_\_

\*See chapter 4 of *Make Your Money Count* to learn more about making your goals clear and achievable.

What will it mean to the people you love when you accomplish these goals?

What obstacles may prevent you from achieving your goals?

To accomplish these goals, what next steps will you take?

Look at each of the goals you have listed above. What will it mean to you to accomplish these goals?



Please visit [MakeYourMoneyCount.org](http://MakeYourMoneyCount.org) and sign up for our blog and keep taking “the next step” to your financial freedom. We look forward to meeting you at a workshop soon!