



INTENTIONALLY

Wealthy Women

*Action Squad*

IWW  
ACTION SQUAD

Session 6  
June 22, 2022

# IWW ACTION SQUAD

I selected salient tips & tools for your RAPID success in our  
**3-Month GPS\***

\*GUIDED PRO\$PERITY SYSTEM

# Intentionally Wealthy Women Action Squad

- Discovering Where We Are – April 13th
- Re-Imaging Our Future – April 27
- Next Action Steps to Get There – May
- Clearing Money Blocks-Barry Auchettl- June
- Monitoring Progress-Pivoting As Needed-June
- Celebrating Progress – At Every Win FOREVER!



ROAD

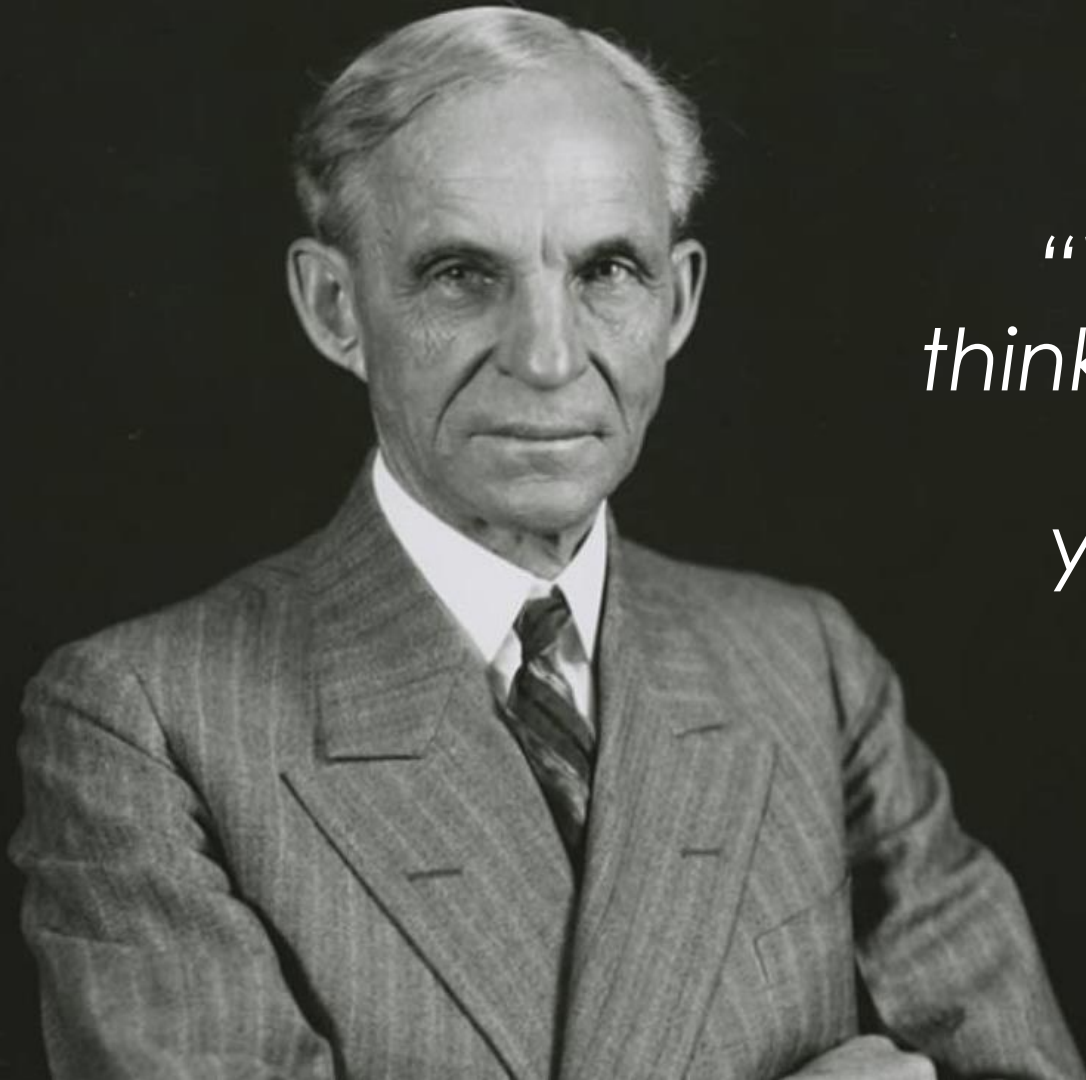
WRONG  
WAY

ROAD  
CLOSED



DETOUR





*“Whether you  
think you can, or  
you can’t,  
you’re right.”*

# Action Squad WORKBOOK

- 1) Declare Our Intentions.
- 2) Assess Our Present-How Did We Get Here?
- 3) Identify Current Pain Points?
- 4) Write Down Past Mis-Steps So You Can FORGIVE Yourself.
- 5) Scale of 1-10 How Ready Do You Feel to Let Pain Go?
- 6) Make Conscious Our Actions-Repetitive or Re-Imagined?
- 7) Create INTENTION to Become A Wealthy Woman.
- 8) Discover our WHY.
- 9) COMMIT to Make It Happen!



# Life-Line Chunked Down-Goals

## EMOTIONS

## Goals

Emerg Fund  
Course Fees  
Virtual Assoc.

Systematic  
Investing

Max 401 (k)  
2<sup>nd</sup> VA Salary  
Vacation Fund

Italy  
Vacation

New Car  
Golf League  
Record Studio

House on  
Water

College Tuition  
Elective Surgery  
Full-Time Assoc

Cruise  
Hawaiian  
Islands

Philanthropy  
Pay off Mortgage  
Retirement

Free to Jump a  
Plane to Put a Smile  
on Someone's Face

# Life-Line Chunked Down-Goals & Invests

## EMOTIONS

### Goals

Emerg Fund  
Course Fees  
Virtual Assoc.

Max 401 (k)  
2<sup>nd</sup> VA Salary  
Vacation Fund

New Car  
Golf League  
Record Studio

College Tuition  
Elective Surgery  
Full-Time Assoc

2<sup>nd</sup> Home  
Philanthropy  
Pay off Mortgage  
Retirement

### Time

0-12  
Months

1-3 Yrs.

3-5 Yrs.

5-7 Yrs.

7+ Yrs.

## INTELLECT

**Invest  
Type  
Options yet  
Consult  
w/Financial  
Planner!**

Cash,  
Money  
Mkt, T-Bills

Sh-Term CDs  
T-Bonds

Inc/Bond  
MutFds,  
DivStock or  
Value MutFds

Grwth/Stk  
MutFds,  
Grwth+Inc  
MutFds,

Stocks-  
Small/EmergMkts to  
Diversify Large Stk  
MutFds, Rental RE





FREEDOM

# Money isn't just money

## It Represents:

- **Security/Comfort**
  - Fear of poverty
  - Fear of “not enough”
- **Success**
  - Fear of failure
- **Ego**
  - Fears of inadequacy
  - Confidence/Sense of Self-Worth





Contact Barry  
here:

<https://www.thevisionschool.org/?ref=86>





BECAUSE **HOPE**  
**MATTERS**

# Money Confidence- Then & Now

- Angela 5
- Laura 4
- Leslie 7
- Nancy 7
- Susan 6
- Wendy 6







**Celebrating  
WINNING!**

**Schedule an apt with a  
Fee-Only Fiduciary CERTIFIED  
FINANCIAL PLANNER™**

[www.NAPFA.org](http://www.NAPFA.org)

(National Ass'n of Personal Financial Advisors)

[www.GarrettPlanningNetwork.com](http://www.GarrettPlanningNetwork.com)

## Financial Advisor Interview Questionnaire

1. Why did you become a financial planner?

2. What is your educational and experiential background as it relates to personal financial planning?

3. What are your financial planning credentials/designations and affiliations?

CERTIFIED FINANCIAL PLANNER™ Professional

CPA/Personal Financial Specialist (CPA/PFS)

NAPFA - Registered Financial Advisor

NAPFA - Provisional Member

Chartered Financial Consultant (ChFC)

Certified Public Accountant (CPA)

Chartered Financial Analyst™ (CFA)

Other (i.e. MBA, JD, EA, CLU, RFC): \_\_\_\_\_

4. What are your areas of specialty?

5. Please describe your most common engagement / service provided? And the type of client or client situation you target?

6. Are you a registered representative of any broker/dealer? \_\_\_\_\_

Are you a licensed insurance agent with any company or agency? \_\_\_\_\_

If so, which one(s)?

7. Are you a registered investment adviser? \_\_\_\_\_ with the SEC? \_\_\_\_\_ or State(s) of: \_\_\_\_\_

\_\_\_\_\_

8. Are you a fiduciary? \_\_\_\_\_

9. How are you compensated?

a. Fee-Only, please define method of determining fees:

\_\_\_\_\_

b. Commissions Only:

\_\_\_\_\_

c. Fee and Commissions (fee based), provide typical breakdown:

\_\_\_\_\_

d. Other:

\_\_\_\_\_

10. Do you have minimums for assets, account size, annual fees paid, etc? And what is your typical fee or charge for an initial engagement?

\_\_\_\_\_

11. Do you provide a written agreement detailing the total amount of compensation and services that will be provided in advance of an engagement?

\_\_\_\_\_

12. Do you provide a thorough written analysis of one's financial situation and recommendations?

\_\_\_\_\_

13. Do you offer assistance with implementation with the plan? Please elaborate.

\_\_\_\_\_

14. Will you provide a second opinion or one time review?

\_\_\_\_\_

Signature of Planner: \_\_\_\_\_ Date: \_\_\_\_\_

Firm Name: \_\_\_\_\_

**We Can Do It Women™**

