

A Year of Financial Fitness

- Month 1 Commit & Get Organized
- Month 2 Last Love Letter (Estate Planning)
- Month 3 Tax Wise & Tax Etiquette (Tax Planning)
- Month 4 Just Enough - Protection (Insurance)
- Month 5 Spending Intentions Aligned with Life Intentions (Cash flow)
- Month 6 Health Wealth (Health)
- Month 7 Financial Check-In: How's your fitness? Recommit ...
- Month 8 Recess and regroup
- Month 9 Education - How Do We Value Learning? (Education Planning)
- Month 10 Saving, Investing, Directing \$ Energy (Investment Planning)
- Month 11 “Retirement” - The Big Myth (Long Term Planning)
- Month 12 Completion - Unique Genius Gifts in the World - Financially Fit

