

My Prosperity Planner

Name: _____

Date: _____

Prosperity means different things to different people. The journey to achieve it can be simple and fun. Set priorities, plan small steps, take each step and remember to enjoy lots of sunshine along the way. One other thing – it helps to have a Coach and a few tools to make the journey that much more rewarding. Welcome to the Prosperity Planner. We're glad you're here.

In one word, what does prosperity mean to you? _____

Starting Points

Let's begin your prosperity conversation with what's most important to you. Think about your future and describe what it looks like in these areas.



Must Do & Love To

While prosperity isn't all about money, money influences financial priorities and inspires possibilities, especially when matched with a plan. What does prosperity mean to you?

Choose three from the Must Do column and three from Love To, to start your Libro coaching conversation.

	Must Do	Love To
Set \$ aside monthly	<input type="checkbox"/>	<input type="checkbox"/>
Reduce debt stress	<input type="checkbox"/>	<input type="checkbox"/>
Home of my own	<input type="checkbox"/>	<input type="checkbox"/>
A better home of my own	<input type="checkbox"/>	<input type="checkbox"/>
Reliable transportation	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility in my budget	<input type="checkbox"/>	<input type="checkbox"/>
Do my own business thing	<input type="checkbox"/>	<input type="checkbox"/>
Travel the world	<input type="checkbox"/>	<input type="checkbox"/>
Invest like a guru	<input type="checkbox"/>	<input type="checkbox"/>
Invest in my community	<input type="checkbox"/>	<input type="checkbox"/>
Babies	<input type="checkbox"/>	<input type="checkbox"/>
Educate my kids	<input type="checkbox"/>	<input type="checkbox"/>
Educate myself	<input type="checkbox"/>	<input type="checkbox"/>
Gourmet kitchens & en-suites	<input type="checkbox"/>	<input type="checkbox"/>
Freedom fifty-something	<input type="checkbox"/>	<input type="checkbox"/>
Freedom sixty-something	<input type="checkbox"/>	<input type="checkbox"/>
Personal wellness	<input type="checkbox"/>	<input type="checkbox"/>
Just have dinner out whenever	<input type="checkbox"/>	<input type="checkbox"/>
Other stuff _____	<input type="checkbox"/>	<input type="checkbox"/>

My Prosperity Strategy

Name: _____

Date: _____

Every journey starts somewhere. So set the stage:
where are you today with your money?
 Then we'll set your goals together.

Will in place Y: _____ N: _____ **Last Updated:** _____

POA in place Y: _____ N: _____ **Last Updated:** _____

Insurance advisor Y: _____ N: _____ **Last Updated:** _____

MONEY NOW:

What I have

Savings \$ _____

Investments \$ _____

Major Assets \$ _____

Total \$ _____

What I owe

Mortgages \$ _____

Loans/Lines of Credit \$ _____

Credit cards \$ _____

Net Worth \$ _____

MONEY IN:

Your Income \$ _____

Spouse's Income \$ _____

Other \$ _____

Total \$ _____

MONEY OUT:

Saving \$ _____

RRSP/RESP Contr. \$ _____

Mortgage/Rent/Taxes \$ _____

Home Maintenance \$ _____

Food \$ _____

Utilities \$ _____

Phone/Internet/Cable \$ _____

Insurance (home, auto, life) \$ _____

Childcare \$ _____

Education \$ _____

Clothing \$ _____

Fun \$ _____

Car/Gas/Parking \$ _____

Charitable Giving \$ _____

Loans/Lines of Credit \$ _____

Credit Card \$ _____

Total \$ _____

MY GOALS: What will you do this year on your prosperity journey?

Spending	_____

Saving	_____

Debt	_____

Investments	_____

Other	_____
