



Part 1: Coaching Syllabus

Contact Information

Deborah Owens

Telephone: 240-583-1686

Email: deborah.owens@wealthyu.com

Course Materials

- A Purse of Your Own Financial Makeover Kit
- A Purse of Your Own Binder
- Nasdaq: <http://nasdaq.com/investingdozen>
- <http://deborahowens.com>

Course Requirements

- Internet connection, Mobile Phone

Coaching Session

- Time: TBD
- Purseonal Success Plan Online Workshop



Part 2: Coaching Course Overview

Session	Topic	Activities	Assignment
Session 1	Initial Sign up Instructions for PSP Online Course	Overview	Complete and return Are You A Wealthy Woman Questionnaire
Coaching Session	Review Questionnaire	Create Game Plan	Session 1
Session 2	Introduction	Download worksheets Create Your Binder Use your Purseonal Journal For Your Purse Story Reflect on questions at the end of each chapter in Purse Journal	Introduction A Purse of Your Own Intro Purseonality Quiz Purse Story/ Purseonal Journal Purseonal Financial Statement
Coaching Session	Review Introduction Module	Reflect/Review/Next Steps	
Session 3	Wealthy Habit#1: Outlook	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 1 Purseonality Profile The Sum of Your Dreams Getting the Bottom of Your Purse/Money Diary Get Out of Debt Strategy
Coaching Session	Review Wealthy Outlook Module	Reflect/Review/Next Steps	
Session 4	Wealthy Habit#2 Vision	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 2 Purseonality Profile The Sum of Your Dreams Finding More Money to Invest My Comparative Advantage
Coaching Session	Review Wealthy Vision	Reflect/Review/Next Steps	
Session 5	Wealthy Habit# 3 Appetite	Reflect on questions at the end of each chapter in	A Purse of Your Own Chapter 3



Session	Topic	Activities	Assignment
		Purse Journal	Purseonality Profile How Money Works The Rule of 72 Shopping For Stocks
Coaching Session	Review Wealthy Appetite	Reflect/Review/Next Steps	
Session 6	Wealthy Habit# 4 Mindset	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 4 Purseonality Profile Purse Portfolio How to research stocks Learning the Language of investing
Coaching Session	Review Wealthy Mindset	Reflect/Review/Next Steps	
Session 7	Wealthy Habit# 5 Focus	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 5 Purseonality Profile Adding Bonds To Your Purse Asset Allocation Income: No Strings Attached
Coaching Session	Review Wealthy Focus	Reflect/Review/Next Steps	
Session 8	Wealthy Habit# 6 System	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 6 Purseonality Profile The Feeling is Mutual Matching A Fund to Your Needs Systematizing Strategies
Coaching Session	Review Wealthy System	Reflect/Review/Next Steps	
Session 9	Retirement	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 7 Purseonality Profile How Much Do You Need In Your Purse



Session	Topic	Activities	Assignment
			Retirement Outlook Retirement Jumpstart
Coaching Session	Review Wealthy Legacy	Reflect/Review/Next Steps	
Session 10	Wealthy Habit# 7 Legacy	Reflect on questions at the end of each chapter in Purse Journal	A Purse of Your Own Chapter 8 Purseonality Profile Life Insurance 101 Paying Our Purses Forward It's A Family Affair
Coaching Session	Review Wealthy Legacy	Reflect/Review/Next Steps	
Utilizing The Habits in Harmony	Wealthy Lifestyle:	Your Purseonal Success Blueprint	A Purse of Your Own Chapter 9 Purseonality Profile Are You A Wealthy Woman? I Am a Wealthy Woman Purse Story Rewrite
Final Coaching Session	Review Blue Print	Final Session	