

5 DAY SAVVY MONEY MAKEOVER

FREE CHALLENGE

**"Building Your First Investment Portfolio
To 7 Figures And Beyond"**



This workbook will be your notes, planner, and your roadmap to accelerating your financial growth.

SESSION 1

WHAT'S IN YOUR PURSE

ARE YOU ON TRACK?

1. I AM INVESTING _____ PERCENT
2. I AM LEVERAGING ALL MY OPTIONS Y/N
3. I AM ON TRACK TO SECURE MY FUTURE Y/N
4. I HAVE A ___X TIMES SAVINGS FACTOR
5. MY INVESTMENT KNOWLEDGE IS A _____
6. MY PORTFOLIO ALLOCATION IS __/___
7. I HAVE CREATED AN ESTATE PLAN. Y/N

Action Items

1.

2.

3.

Continued...

SESSION 1

KEY TAKEAWAY: WHAT IS YOUR WEALTH GAP?

MINDSET*STRATEGY* EXECUTION:

ON YOUR OWN:

My GAP: _____

My OPPORTUNITY: _____

Why is this urgent?

ACTION ITEMS:
What IS YOUR WEALTH GAP?
FACE IT! FIGURE IT OUT! FIX IT!



Connect with Your Ambassador



**Virginia
Rutherford-Hall**



Michelle Smith



Anita Jenkins

Have Questions?

Link with a WEALTHYU Team member

- **Get to know WealthyU:**

Our team members are listed at the end of this workbook.

- **Not sure who your Ambassador is?**

- **GET HELP FAST:**

Comment on any of our posts & we'll make sure you get connected.

SESSION 2

Accelerate Your Financial Growth

**My personal rate
of return :_____**

5 Ways to increase my rate of return:

1.

2.

3.

4.

5.

ON YOUR OWN:

What are your top 3 acceleration strategies?

1. _____

2. _____

3. _____

SESSION 3

Investment Power Levers

The 4 Milestones:

1. _____

2. _____

3. _____

4. _____

ACTION ITEMS:

What levers will have the greatest impact on accelerating my financial growth?

SESSION 4

Portfolio Challenge

Choose 5 Stocks

1. _____
2. _____
3. _____
4. _____
5. _____

ACTION ITEMS:

What did you learn from this exercise? How will you execute on what you have learned?

About Your Masterclass Instructor

ABOUT DEBORAH OWENS

Deborah Owens is America's Wealth Coach™ and is on a mission to help women overcome their fear of investing through coaching, accountability, and support.

She is the founder of WealthyU: A Financial Wellness company that has a proven track record of helping thousands of women transform from cautious savers into confident investors.

After spending two decades in the investment industry Deborah has authored three critically acclaimed books; A Purse of Your Own: An Easy Guide to Financial Security, published by Simon and Schuster, Nickel and Dime Your Way to Wealth, and Confident Investing. Deborah created WealthyU to give women access to information that could only be obtained through private wealth managers. She is a 20-year financial services industry veteran and former vice president with Fidelity Investments.

Ms. Owens founded WealthyU to create customized training and coaching for companies and individuals. She holds a Masters of Business Administration from Loyola University of Maryland.



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