

**YOU** — This is something you do to take care of yourself.

*IDEAS...* go on a vacation, fly first class or business class, stay in a 4 or 5 star hotel, get a massage, go out for an incredible dinner, buy something special just for you or your loved ones, donate to your favorite charity, do yoga, go fishing, go golfing, go to a concert, exercise, practice meditation, go for lunch or coffee with special people in your life, attend a seminar or trade show, learn to paint, learn a new business or personal skill, join Toastmasters, read a book or a romance novel, or catch up on a Dragon Class.

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**YOUR MONEY** — This is something you do to make more money so your financial security is guaranteed.

*IDEAS...* review your expenses, pay off debt, make a budget, pay down your debt, build emergency fund, cut up unused credit cards, cancel useless subscriptions and memberships, buy insurance, cash out on investments, find more tax write offs, refinance your mortgage, review your financial statements, put money in your savings account, and make investment.

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**YOUR MARKETING** — This is a way for you to attract, retain and ascend your clients.

*IDEAS...* create a lead magnet, set up a funnel, email your list, look for joint venture partners, re-activate past client relationships, follow up with unconverted leads, post more content on social media, speak to a group of ideal clients, launch a membership program, write a book, raise your prices, up-sell existing clients to higher-profit services, stimulate referrals, promote other offers to your audience.

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**YOUR SYSTEM** — This is something you do to systemize or automate your business or finances, so you have less and less to do.

*IDEAS...* money management systems, accounting systems, inventory systems, ordering systems, client attraction systems, client retention systems, client optimization systems, management systems, create your operation manual, clarify your front desk procedures, refine your opening and closing procedures, establish your business core values, update your policy manual.

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**YOUR TEAM** — This is something you do to seek help from others so you have more freedom to do what you love.

*IDEAS...* hire a bookkeeper, hire more skilled staff, hire a manager, network with other high level entrepreneurs, hire a consultant or coach, coach your team, send your team for training, show your appreciation to your staff, praise your superstar in public, give bonuses and praise to all your staff.

NAME: \_\_\_\_\_ TODAY'S DATE: \_\_\_\_\_ DATE OF NEXT LESSON: \_\_\_\_\_

## YOU

I will \_\_\_\_\_  
by this date: \_\_\_\_\_, by breaking into  
three measureable levels.

**MINIMUM:** \_\_\_\_\_

**TARGET:** \_\_\_\_\_

**OUTRAGEOUS:** \_\_\_\_\_

**DELEGATION:** To help me, I'll ask the following person or company:  
\_\_\_\_\_ to provide the following  
specific service for me: \_\_\_\_\_

1	GOAL RECORDED
2	"M" ACHIEVED
3	"T" ACHIEVED
4	"O" ACHIEVED
5	DELEGATION ACHIEVED
	<b>MY SCORE</b>
15 possible points	

## YOUR MONEY

I will \_\_\_\_\_  
by this date: \_\_\_\_\_, by breaking into  
three measureable levels.

**MINIMUM:** \_\_\_\_\_

**TARGET:** \_\_\_\_\_

**OUTRAGEOUS:** \_\_\_\_\_

**DELEGATION:** To help me, I'll ask the following person or company:  
\_\_\_\_\_ to provide the following  
specific service for me: \_\_\_\_\_

1	GOAL RECORDED
2	"M" ACHIEVED
3	"T" ACHIEVED
4	"O" ACHIEVED
5	DELEGATION ACHIEVED
	<b>MY SCORE</b>
15 possible points	

## YOUR MARKETING

I will \_\_\_\_\_  
by this date: \_\_\_\_\_, by breaking into  
three measureable levels.

**MINIMUM:** \_\_\_\_\_

**TARGET:** \_\_\_\_\_

**OUTRAGEOUS:** \_\_\_\_\_

**DELEGATION:** To help me, I'll ask the following person or company:  
\_\_\_\_\_ to provide the following  
specific service for me: \_\_\_\_\_

1	GOAL RECORDED
2	"M" ACHIEVED
3	"T" ACHIEVED
4	"O" ACHIEVED
5	DELEGATION ACHIEVED
	<b>MY SCORE</b>
15 possible points	

## YOUR SYSTEM

I will \_\_\_\_\_  
by this date: \_\_\_\_\_, by breaking into  
three measureable levels.

**MINIMUM:** \_\_\_\_\_

**TARGET:** \_\_\_\_\_

**OUTRAGEOUS:** \_\_\_\_\_

**DELEGATION:** To help me, I'll ask the following person or company:  
\_\_\_\_\_ to provide the following  
specific service for me: \_\_\_\_\_

1	GOAL RECORDED
2	"M" ACHIEVED
3	"T" ACHIEVED
4	"O" ACHIEVED
5	DELEGATION ACHIEVED
	<b>MY SCORE</b>
15 possible points	

## YOUR TEAM

I will \_\_\_\_\_  
by this date: \_\_\_\_\_, by breaking into  
three measureable levels.

**MINIMUM:** \_\_\_\_\_

**TARGET:** \_\_\_\_\_

**OUTRAGEOUS:** \_\_\_\_\_

**DELEGATION:** To help me, I'll ask the following person or company:  
\_\_\_\_\_ to provide the following  
specific service for me: \_\_\_\_\_

1	GOAL RECORDED
2	"M" ACHIEVED
3	"T" ACHIEVED
4	"O" ACHIEVED
5	DELEGATION ACHIEVED
	<b>MY SCORE</b>
15 possible points	

## MY SIGNATURE

\_\_\_\_\_

## RATING MY PROGRESS

0-6..... A Rest Month

7-15..... Comfortably Wealthy

16-29..... Seriously Wealthy

30-44..... Truly Wealthy

45+..... Super Wealthy

**TOTAL SCORE**

# WEALTH BY DESIGN

## START HERE AT THE BEGINNING OF EACH MONTH

**1** Print your name.

**2** Print Today's date.

**3** Print of the last day of the month.

MY NAME <i>Jane Smith</i>	TODAY'S DATE <i>January 1st</i>	DATE OF NEXT LESSON <i>January 31st</i>
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**4** Record the action you will take.

**5** Record the deadline for this Goal which must be on, or before the date of the next lesson so that you hold yourself accountable for progress every month.

**6** Record a small step you can be counted on to take based on your past performance.

**7** Record a bigger step which you consider to be a stretch for you.

**12** Circle '1' to show you have earned 1 point for recording this Goal. Do it NOW as a congratulations to yourself for recording your goal.

YOUR MARKETING	I will <i>create a new website</i> by this date: <i>January 25th</i> by breaking it into three measurable levels	1 GOAL RECORDED
	MINIMUM: <i>go online, research 3-5 reputable website development companies</i>	2 "M" ACHIEVED
TARGET: <i>interview and hire a website development company</i>	3 "T" ACHIEVED	4 "O" ACHIEVED
OUTRAGEOUS: <i>get my website built and launched</i>	5 DELEGATION ACHIEVED	MY SCORE <i>8</i> 15 possible points
DELEGATION: To help me, I'll ask the following person or company <i>Dan Lok</i> to provide the following specific service for me <i>tell me which web development company to go with</i>		

## START HERE AT THE END OF EACH MONTH

**A** Circle '2' points if you achieved the MINIMUM.

Circle '3' points if you achieved the TARGET.

Circle '4' points if you achieved the OUTRAGEOUS.

Circle '5' points if any person, group or company helped you achieve this goal in any way.

**B** Total your Goal Score and write it in the oval.

**C** Add the individual Goal Scores to get Month Total. Enter it in this oval.

**D** Circle your rating.

**8** Record a huge step which you consider possibly even beyond your reach.

**9** Record the name of the person (not yourself), group or company which can do all or part of this Goal for you or with you. (i.e. a mover, handyman, family, friend, bookkeeper, etc.)

**10** Record specifically what you would like that person to do for you.

**11** See instruction 12 above right. It is very important to do this right now.

MY SIGNATURE <i>Jane</i>	<b>RATING MY PROGRESS</b> 0-6... A Rest Month 7-15... Comfortably Wealthy 16-29... Seriously Wealthy 30-44... Truly Wealthy 45+... Super Wealthy	TOTAL SCORE <i>35</i>
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**13** Sign your name to show commitment to yourself.

**14** What one goal from your Wealth By Design could you accomplish you know would significantly move you towards more financial and personal freedom? Circle this goal. Display your Wealth By Design in a place that you will see it every day as a friendly reminder. Review your goals as often as possible – at least once or twice a week.