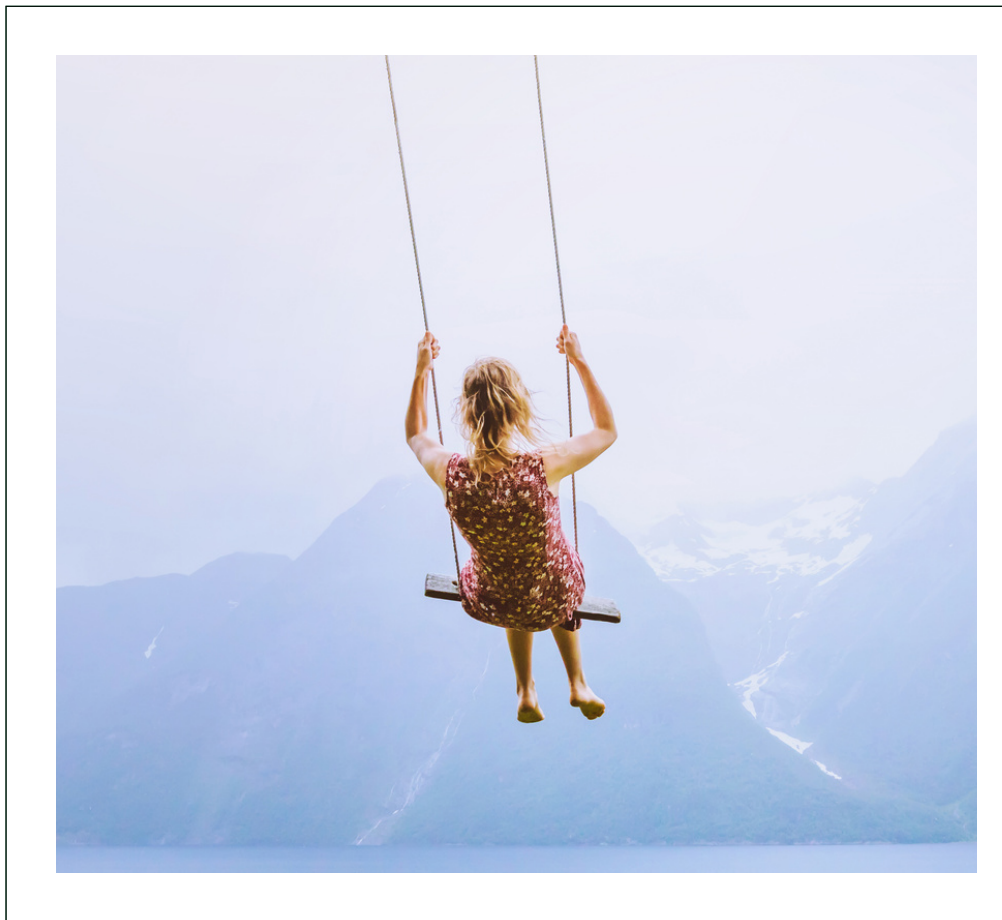


MASTERCLASS WORKBOOK

Financial Resilience, Confidence & Clarity



Financial Resilience, Confidence & Clarity

How to Use This Workbook:

Even with the best intentions, by the time this masterclass is finished, you'll have forgotten half of what you learned, That's because we're infinitely more likely to remember what we write down!

There's a good evidence that the act of writing helps us remember things - specifically when we use pen and paper, NOT writing things down is like asking our brains to forget the workshop, but remember our grocery list from last Tuesday.

So, print this workbook, grab a pen and follow along.

(Or grab your favourite journal!) You'll absorb an incredible amount of information, and with this you'll have a checklist of your own to remind you.

Let's do this.

A handwritten signature in black ink that reads "Sam". The signature is written in a cursive, flowing style.

EXERCISE 1: Emotional Triggers & Limiting beliefs

What common phrases you heard when growing up:

Phrase #1 is _____

Phrase #2 is _____

Phrase #3 is _____

Write down how you can overcome these limiting beliefs and understand your financial self:

#1 Question the _____

#2 Reframe the _____

#3 Seek support and _____

#4 Take action and _____

EXERCISE 2: Design your Life with 3 questions:

Q.1 Money is no object. Describe how you would spend it here...

Q.2 5 to 10 years left to live. Would you change your life from Q1?

Q.3 1 day left to live. What do you wish you had done?

What's your financial purpose/future?

EXERCISE 3: Vision & Emotions

STEP 1 Visualise what you want



STEP 2 What are the key emotions that sum up that feeling?

1 _____

2 _____

3 _____

WHAT'S NEXT?

Create your own Lifestyle Plan

The Lifestyle Plan



Financial Analysis

A clear picture of your current situation to understand what has happened in the past to get you where you are today.



Bespoke Budget

Developing the tools you need to accurately track your spending and provide a framework for the future.



Goals Timeline

Forming a clear picture of what drives you to envision your future and what gives you purpose.



Risk Profiling

Understand the principles of investing to uncover your feelings around risk and loss



Cashflow Modelling

Stress testing your money to ensure you can have the lifestyle you want, throughout different market conditions



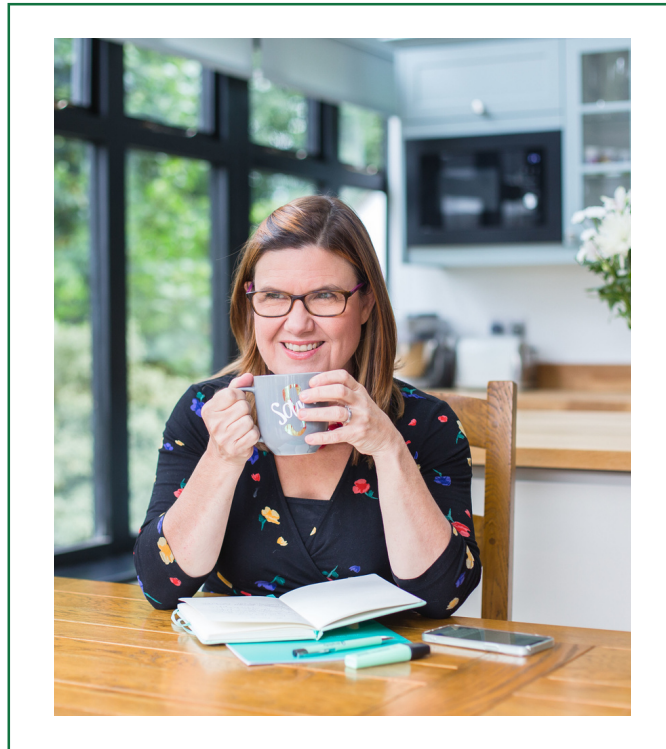
Defining Your Plan

Understand the future steps you can take to reach your desired destination.

**YOU ARE INVITED TO TAKE
THE JOURNEY TO
FINANCIAL RESILIENCE...**

Question is...

ARE YOU READY?



SAM BRADFORD

Hey there, I'm Sam - a chartered financial planner of 20+ years that knows the role of emotions when it comes to creating your financial plan.

Money is not just about the numbers on a balance sheet or the products we invest our money into. It's about the life that money can help us create.

- It's about the dreams we can fulfill
- the security we can provide for ourselves and our loved ones
- and the sense of freedom and Peace of Mind that comes with financial resilience

Let's Chat



<https://calendly.com/samantha-bradford/simplicity>

Join my community



[@groups/thewealthcanvascommunity](https://www.facebook.com/groups/thewealthcanvascommunity)