

The background features a light gray circle with a soft, painterly texture. A green vine with several oval-shaped leaves is illustrated around the circle, starting from the bottom left, curving around the right side, and ending at the top right.

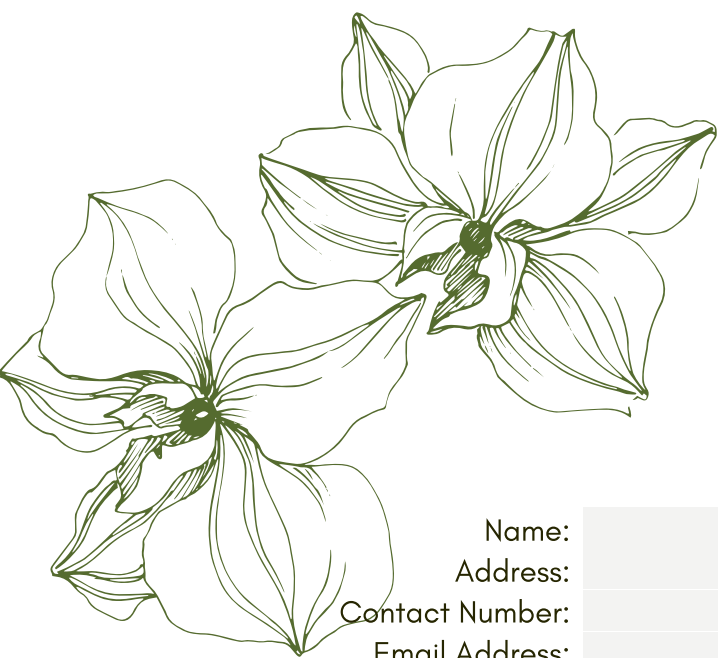
CONSCIOUS WEALTH Journal & Planner

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The Client should refer to an Accountant or Lawyer for ANY and ALL legal and business advice.



MY PERSONAL TEAM

Name:
Address:
Contact Number:
Email Address:

Name:
Address:
Contact Number:
Email Address:

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Address:
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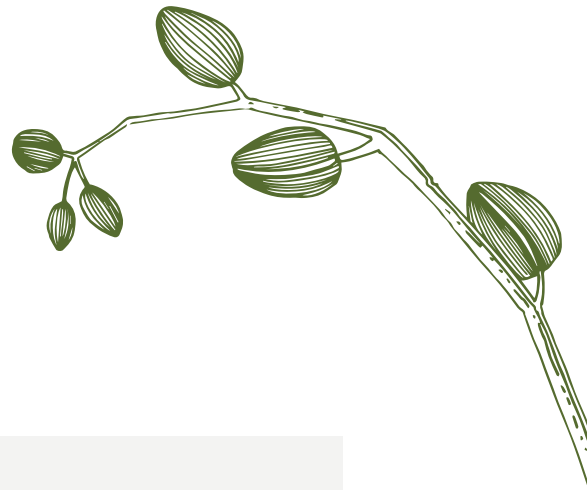
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MY PROFESSIONAL TEAM



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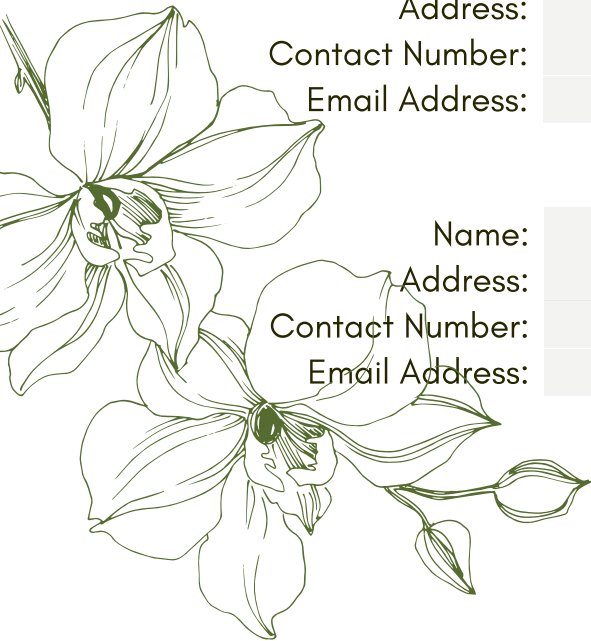
Email Address:

Name:

Address:

Contact Number:

Email Address:





Expense Planning, Visioning & Goal Setting

Essential Expenses

UTILITIES TOTAL=

- ELECTRIC:
- PHONE :
- WATER/ SEWER:
- CABLE/ INTERNET:
- HEAT/ FUEL:
- TRASH:

FOOD TOTAL=

- GROCERIES:
- SCHOOL LUNCHES:

KIDS TOTAL=

- CHILDCARE :
- SCHOOL / PROGRAMS
TUITION:
- CLOTHING:

PET CARE TOTAL=

- VET:
- MEDICINE:
- FOOD:

HOUSING TOTAL=

- MORTGAGE/ RENT:
- LAND TAX:
- HOA FEES:

TRANSPO TOTAL=

- VEHICLE PAYMENT:
- MONTHLY SAVING FOR
MAINTENANCE:
- INSURANCE:
- GAS:

DEBT TOTAL =

- CREDIT CARDS:
- LOANS:
- ALIMONY:

TOTAL

ESSENTIALS=

Essential Expenses

MEMBERSHIPS =

- MAGAZINES:
- STREAMING SERVICES:
- MONTHLY DELIVERY KITS:
- MEAL DELIVERY:
- GYM:
- COSTCO:

KIDS EXTRA =

- SPORTS:
- CAMPS:
- BOOKS:
- TOYS:

SERVICES=

- HOUSE CLEANING:
- MAINTENANCE:

FUN=

- TRAVEL:
- HOBBIES:
- TECH GADGETS:
- CONCERTS & EVENTS:
- CELEBRATIONS:
- BOOKS:

MEALS &

ENTERTAINMENT=

- COFFEE:
- BARS/ RESTAURANTS:
- FAST FOOD:
- ALCOHOL:

PERSONAL CARE=

- COUNSELING:
- BEAUTY PRODUCTS:
- BEAUTY SERVICES:
- MASSAGE/ BODY WORK:

GIVING=

- CHARITY:
- GIFTS:
- RELIGIOUS/ SPIRITUAL COMMUNITY:

TOTAL

ESSENTIALS=

BUILDING YOUR
DREAM LIFE
PART ONE: VISION



GUIDED VISUALISATION: PUTTING GOALS INTO THE FUTURE

You can use this practice for any area of your life. For our purposes, focus on the financial realm.

- Imagine living the highest possible outcome in this area of your life 12 months from now; living your life the way you would if all your financial hopes and dreams were to come true. What is your ultimate reality? Let go of limitations and negativity. Allow yourself to get carried away with your wildest aspirations.
- Imagine what your life will be like once you have completed this goal. Create a picture or movie in your mind and step inside the visual as if you're there, and looking through your own eyes. Adjust all of the qualities of sensory perception (taste, touch, sight, sound, smell) to create the most positive and most real feelings. Who is there with you? Where are you? What is happening around you? What are you doing? Who are you serving? How much are you making?

- Next, take a deep inhale and as you exhale, use your breath to energize the image you've created, filling it with intention and good feelings. Imagine floating out into the future and dropping your visualization into your reality, exactly 12 months from now. Notice all the events between then and now that aligned to support you in accomplishing your goal: What were you doing 3 months, six months, nine months ago to get you here? Visualize this process to make it feel real.
- Once you feel complete, come back to now and open your eyes slowly. Now write a description of your vision like a script to the movie you created in your mind. Write in the present tense and expand on the questions above.
- Consider what action steps you will take in the next week to move you closer to your goal.

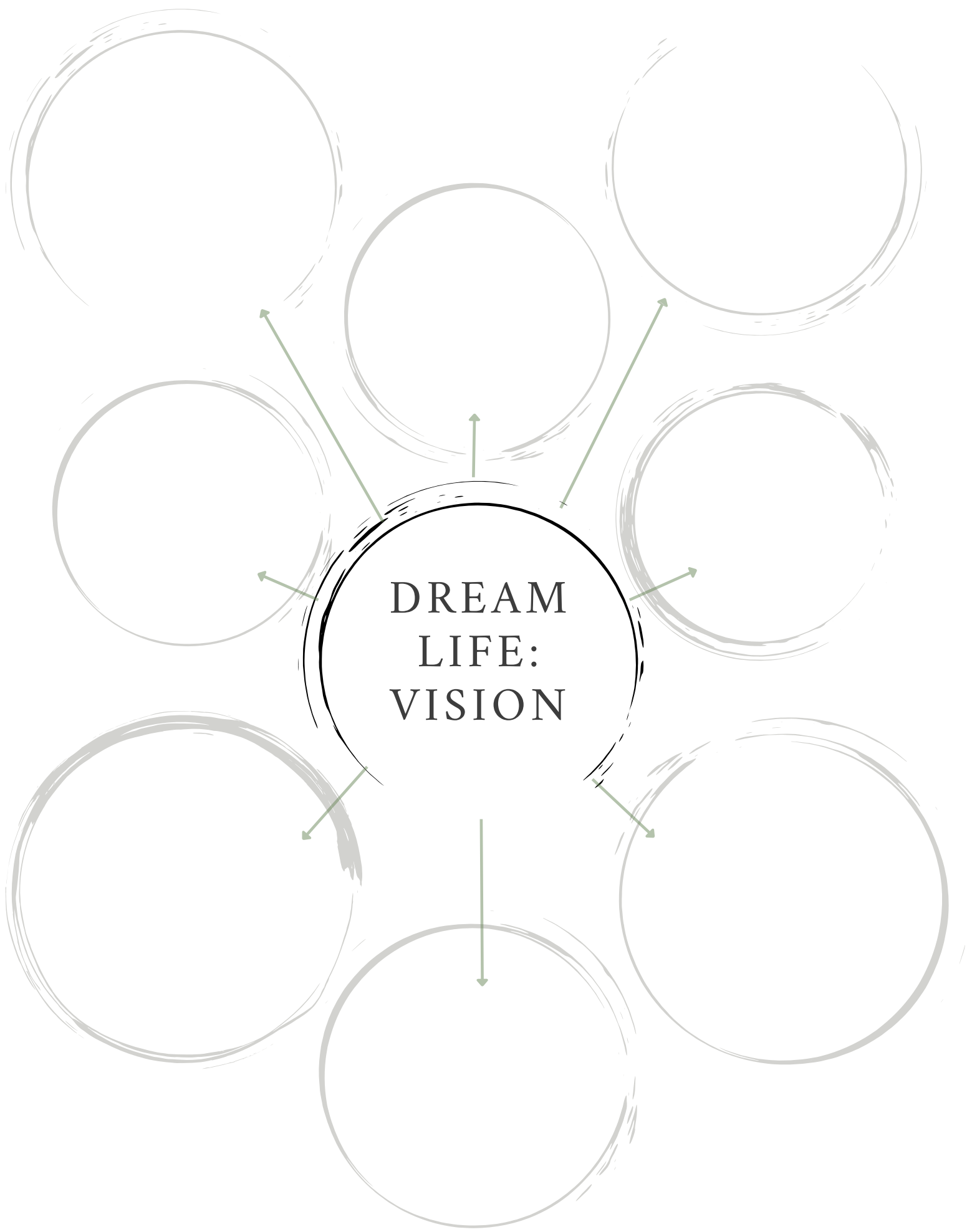
TAKE ACTION, AND MAINTAIN FOCUS

Fill in the attached vision action plan for 3 month to 5 years



USE THE MIND MAP ON THE NEXT PAGE TO HELP YOU,
AND THE SPACE BELOW TO FREE WRITE
WHAT ELEMENTS MAKE UP YOUR DREAM LIFE?
WHAT DO THEY COST?

Write all of the elements that make up the dream life you envision.



REFLECT:

What emotions come up for you while you sit in this vision?

What will having this life do for you?

Connect with one goal you would like to achieve in the next 3 months. Make it something that carries a lot of meaning for you; Choose something that is big enough that you will be left with a high level of accomplishment once you've achieved it.

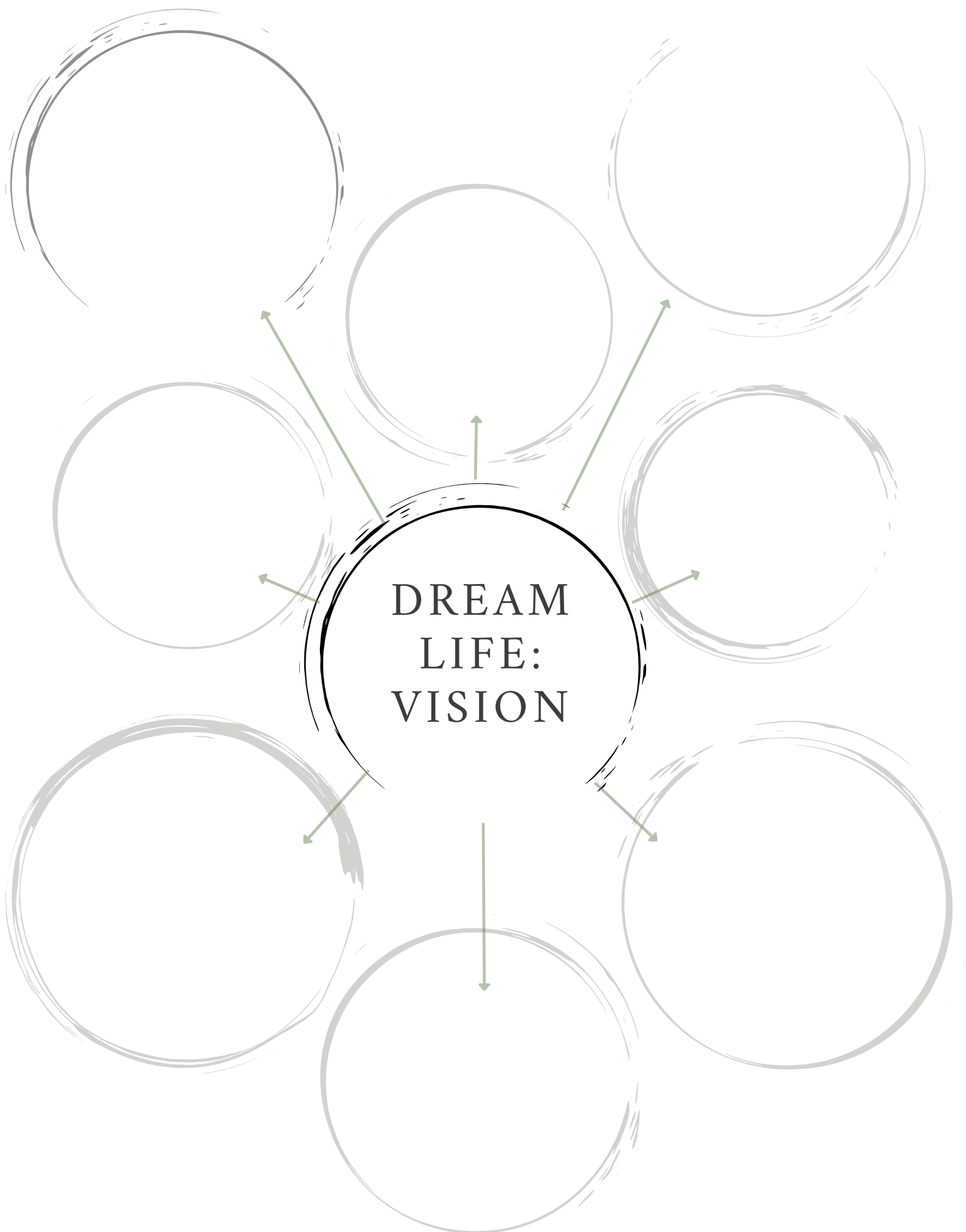
What is that goal? How will you know when you've achieved it?

VISION PLANNER

GET ORGANIZED...

WHEN	VISION	STEPS
THREE MONTHS		
SIX MONTHS		
ONE YEAR		
THREE YEARS		
FIVE YEARS		

Rewrite your vision elements with estimated monthly cost for each.



BRING IT TOGETHER

A: MONTHLY EXPENSES (ESSENTIALS + EXTRAS)

B: PARTNER/ROOMMATE CONTRIBUTIONS _____

C: AMOUNT YOU NEED TO CONTRIBUTE TOTAL (A-B):

D: DREAM LIFE EXPENSES: _____

E: YOUR SALARY NEEDS (C+D) = _____

WHAT YOUR BUSINESS NEEDS

TO MAKE PER MONTH, AKA. REVENUE GOAL : (E x 2)=

*As a rule, your business should to make 1.5-2x your salary needs so that you can save money for taxes and business growth expenses



SMART Goals

SPECIFIC-

SIMPLE, SENSIBLE, SIGNIFICANT

MEASURABLE-

MEANINGFUL, MOTIVATING

ACHIEVABLE-

ATTAINABLE

RELEVANT-

REASONABLE, REALISTIC

TIME BOUND-

TIME-SENSITIVE



Business Expenses

PROFESSIONAL
DEVELOPMENT=

- .
- .
- .
- .
- .
- .

VEHICLE/
TRANSPORTATION=

- .
- .
- .
- .
- .
- .

CREDIT CARD/ LOAN
PAYMENTS=

- .
- .
- .
- .
- .
- .

ADVERTISING /
MARKETING/ WEB=

- .
- .
- .
- .
- .
- .

Business Expenses

SUBCONTRACTING=

- .
- .
- .
- .
- .

SUBSCRIPTIONS=

- .
- .
- .
- .
- .
- .

PAYROLL=

- .
- .
- .
- .

INSURANCE=

- .
- .
- .

UTILITIES=

- RENT
- .
- .
- .
- .

TOTAL MONTHLY BUSINESS
EXPENSES=

OFFICE SUPPLIES=

- .
- .
- .
- .
- .

(SHOULD BE 30% OF WHAT YOU
MADE OR YOUR GROSS PROFIT)

Monthly Profit Planning & Wealth Management





JANUARY



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

MAKE MORE, KEEP MORE



WHICH SERVICE THAT YOU OFFERED HAD THE GREATEST IMPACT ON YOUR BUSINESS?

WHICH SERVICE DO YOU ENJOY THE MOST?

WHAT DECISIONS CAN YOU MAKE WITH THIS INFORMATION?

WHAT WERE YOUR TOP SPENDING CATEGORIES?

DO YOU WANT TO CHANGE ANYTHING ABOUT YOUR CURRENT SPENDING?

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MONTHLY REVENUE GOAL FROM "BRING IT
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WHAT I NEED TO MAKE UP THE
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KNOWN INCOME)= \$_____

REVENUE PLAN:



TRANSFERS FOR THE MONTH

ACCOUNTS:

WEEK OF	GROSS PROFIT	SALARY 50%	TAX SAVINGS 15-20%	GRATITUDE 0-5%	
					○
					○
					○
					○
					○

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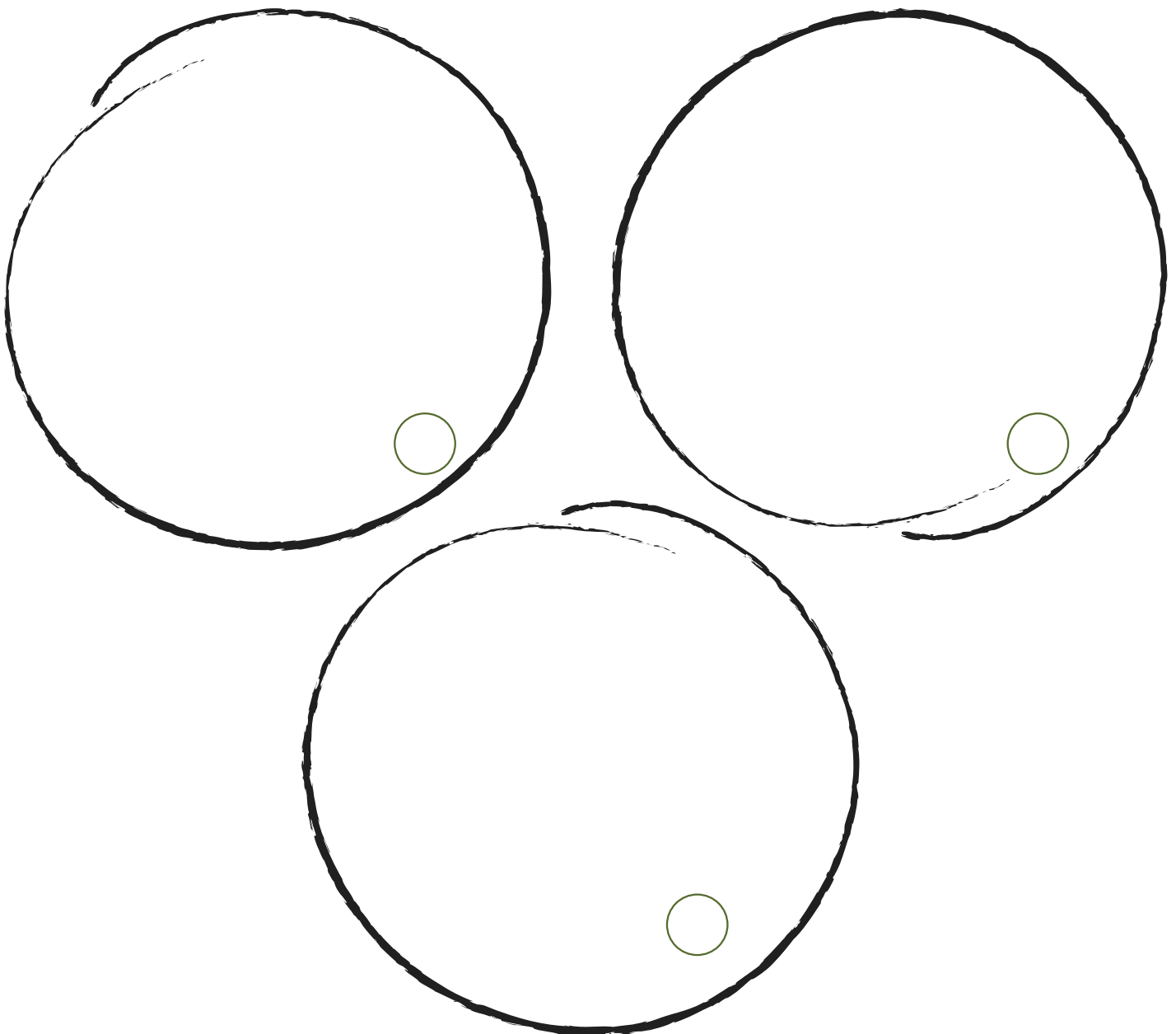
Gross Profit: Total Income - Cost of Goods
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ACTION STEPS

WEEKLY GOAL:

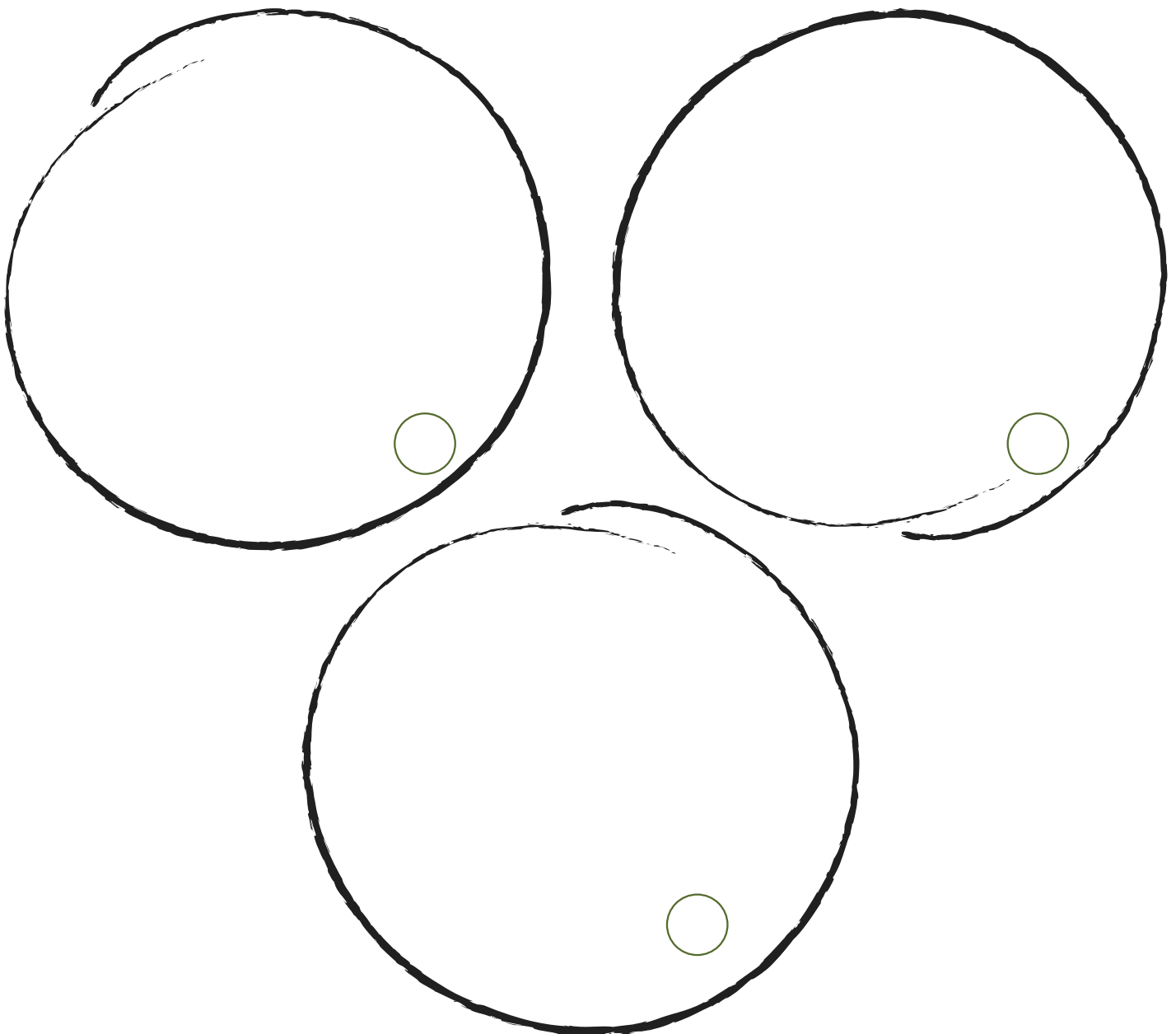


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

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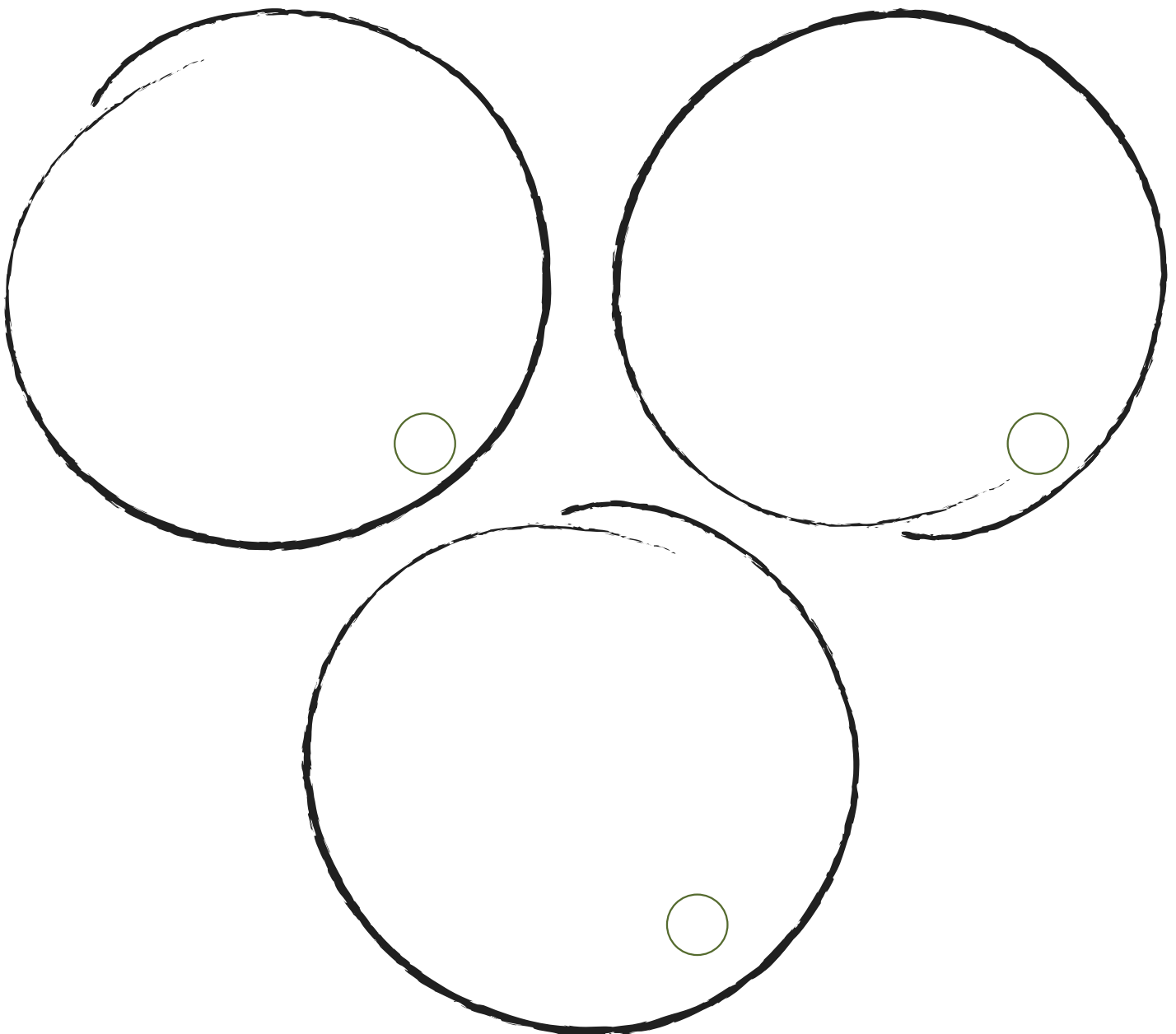


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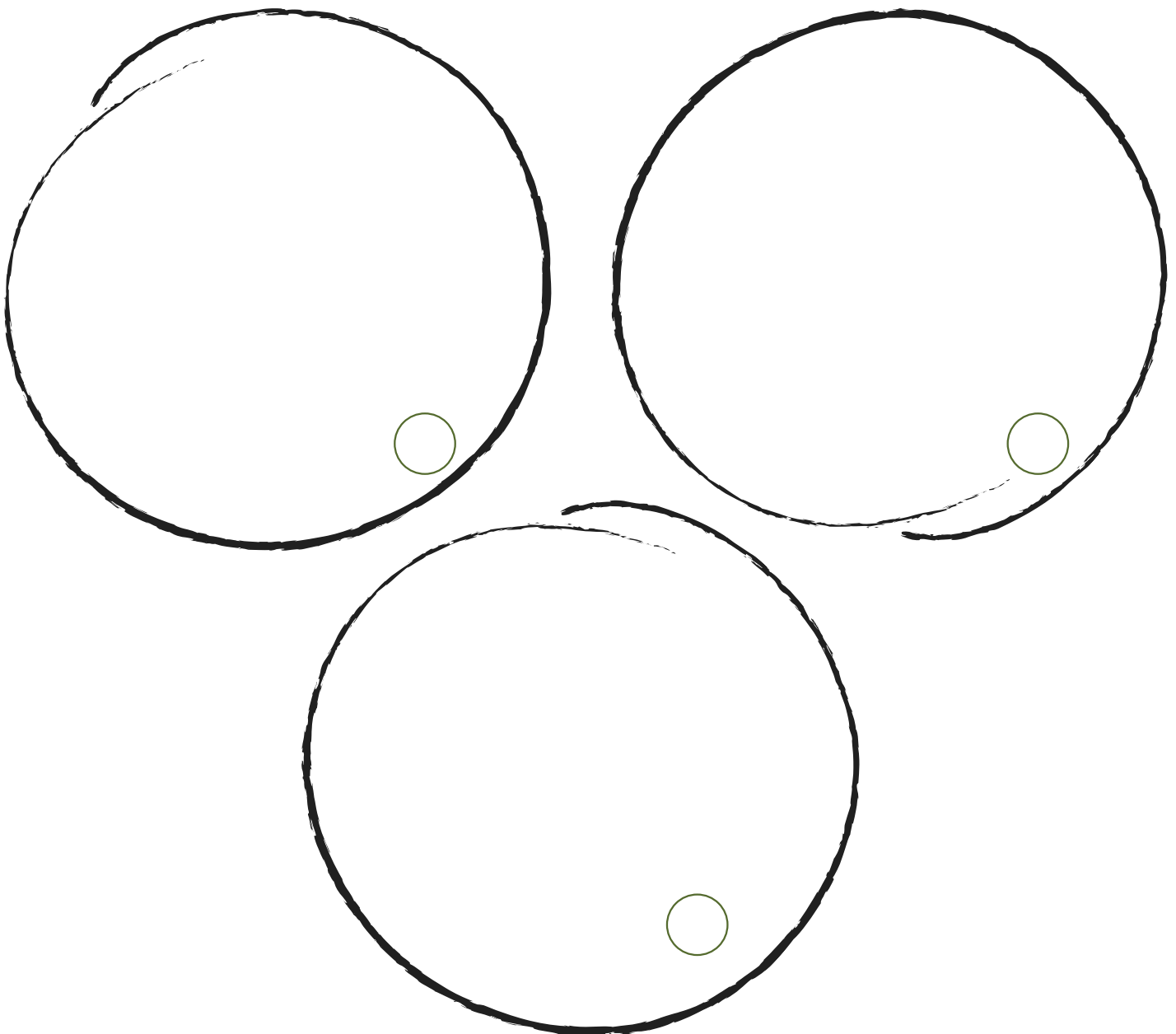


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:



RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.

REFLECTION



LIST THREE THINGS YOU FELT REALLY GOOD ABOUT THIS MONTH:

WHICH AREAS OF YOUR BUSINESS EXPERIENCED THE MOST GROWTH OR TRANSFORMATION?

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ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:





FEBRUARY



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

MAKE MORE, KEEP MORE



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REVENUE PLAN:



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					○
					○
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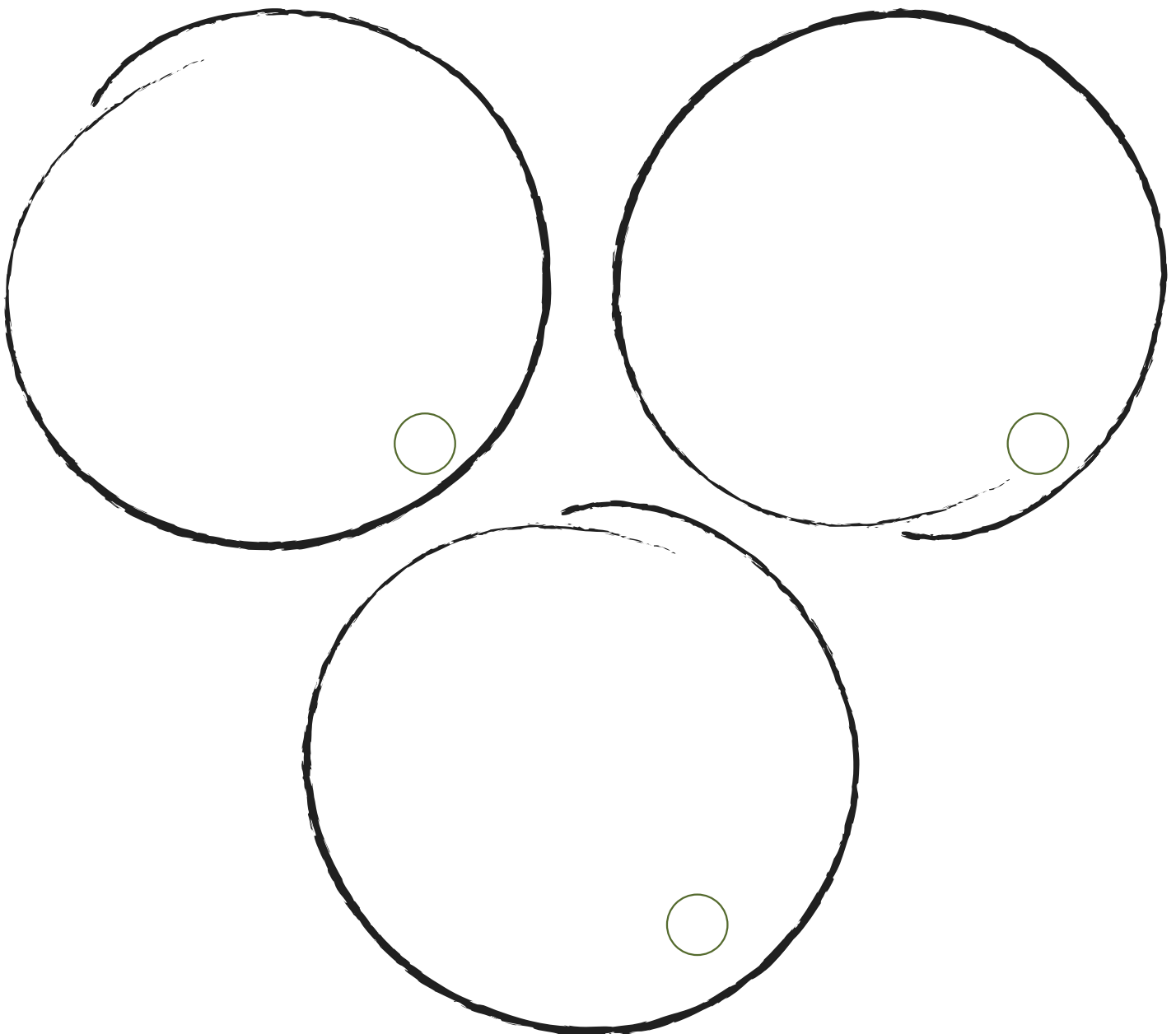
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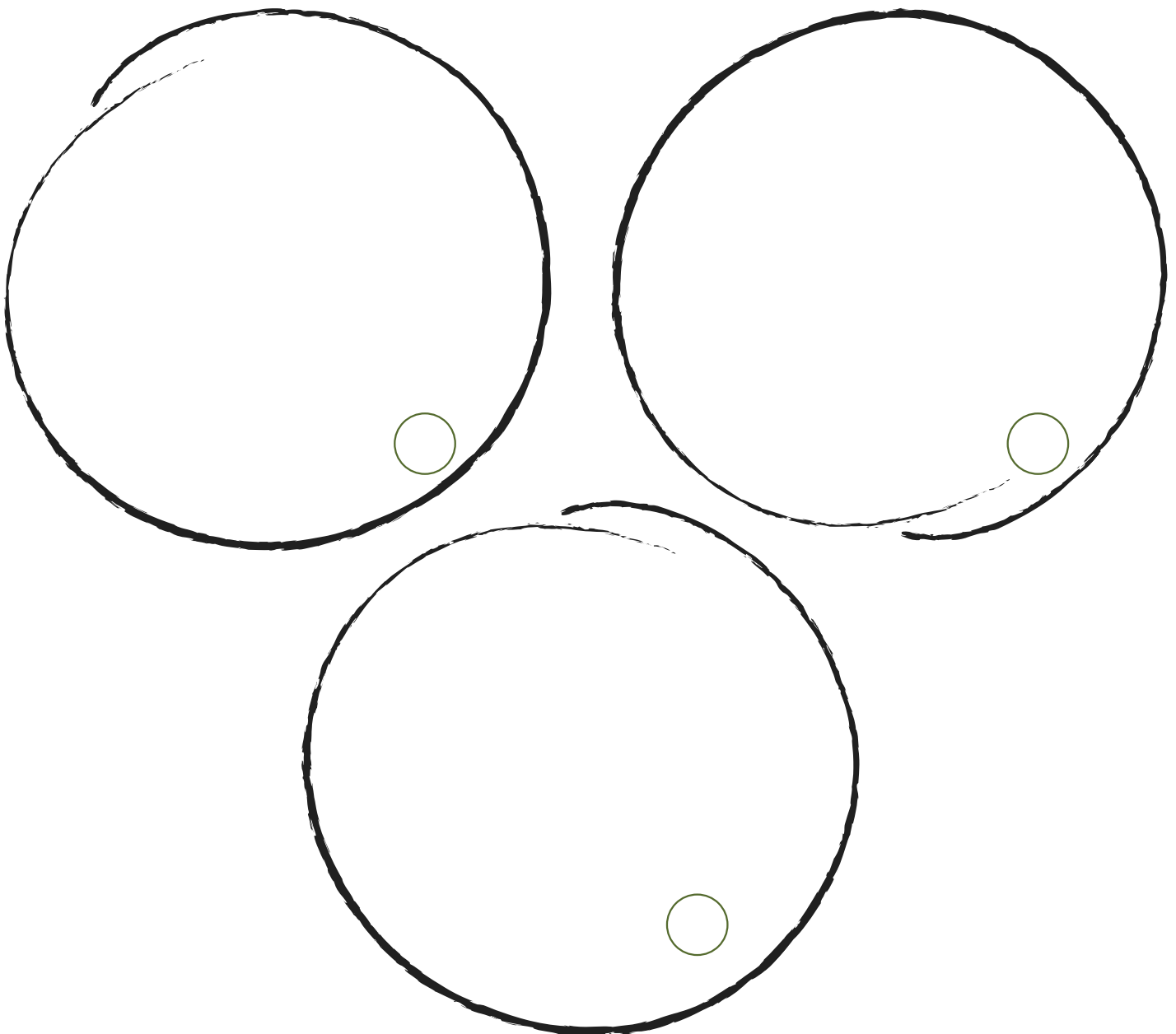


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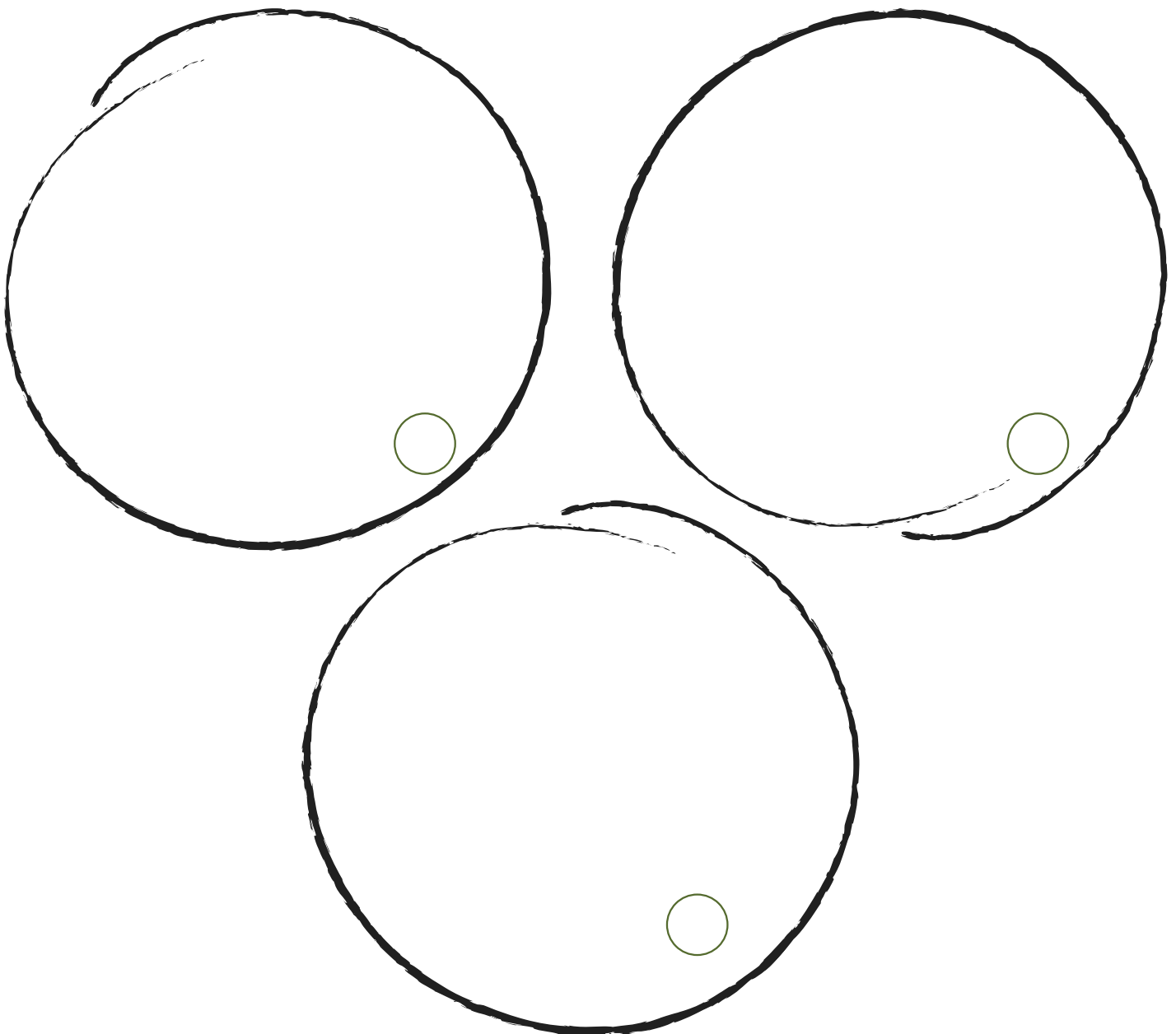


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ACTION STEPS

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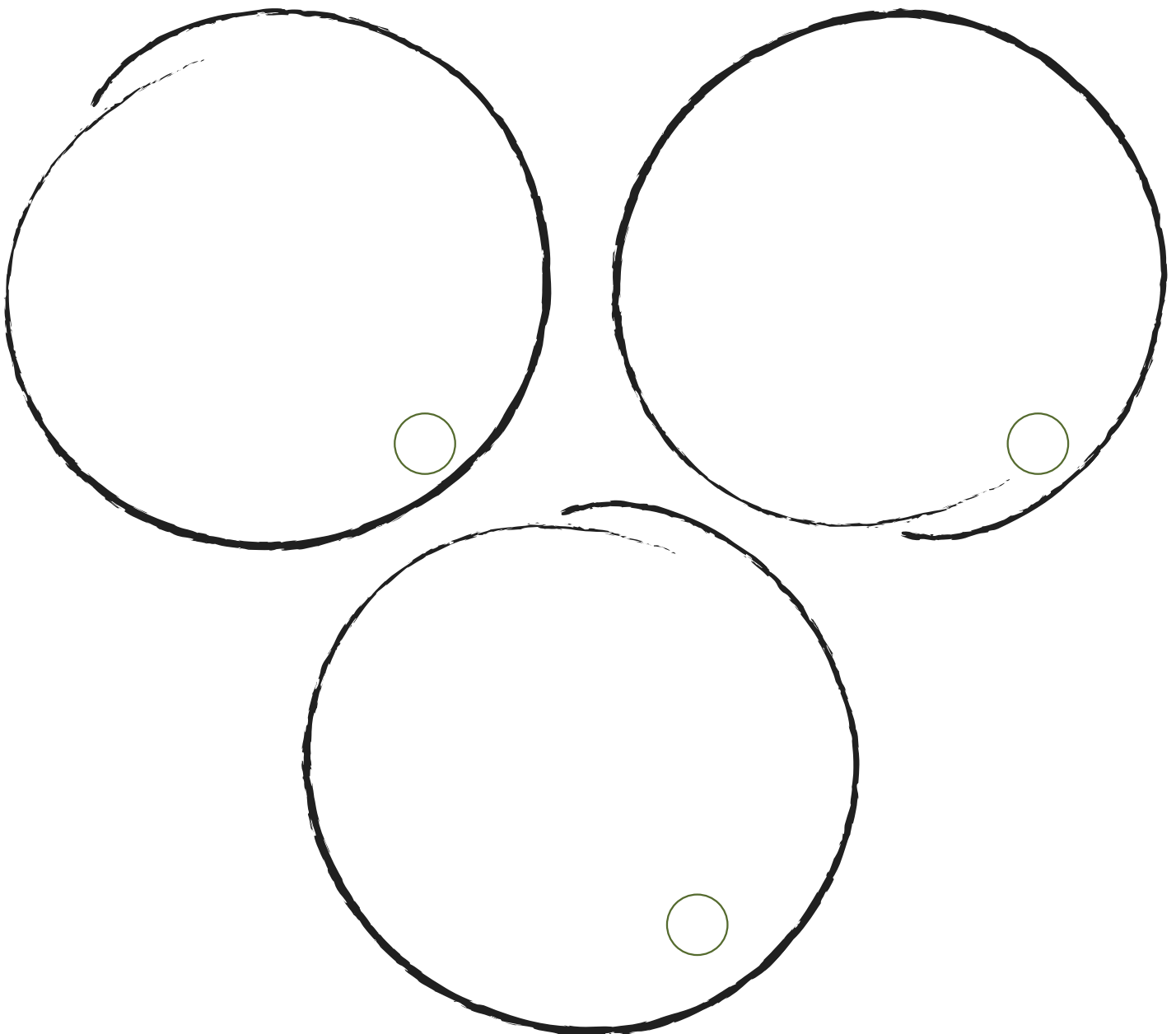


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:



RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.

REFLECTION



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ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:





MARCH



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

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REVENUE PLAN:



TRANSFERS FOR THE MONTH

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					○
					○
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ACTION STEPS

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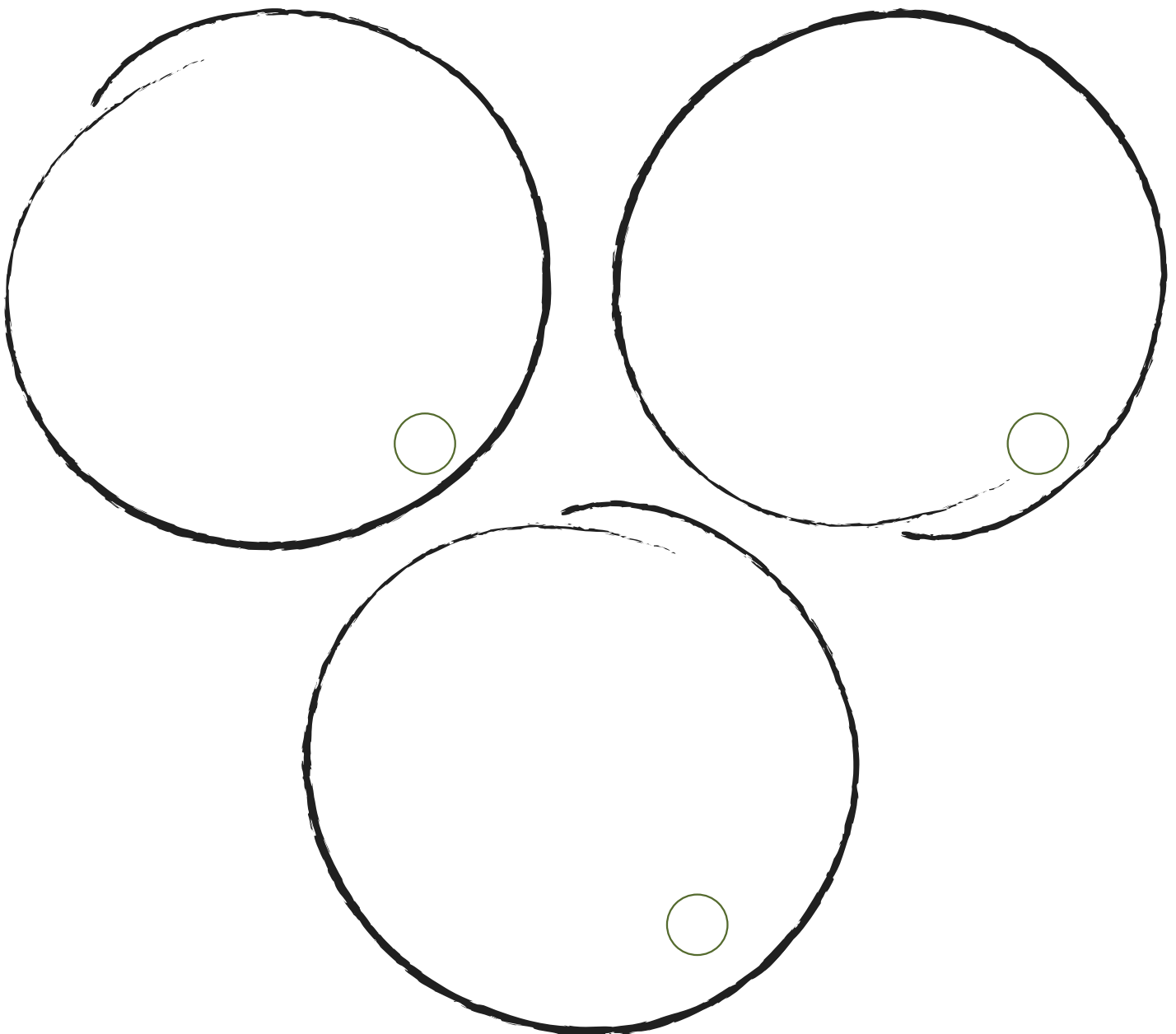
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RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

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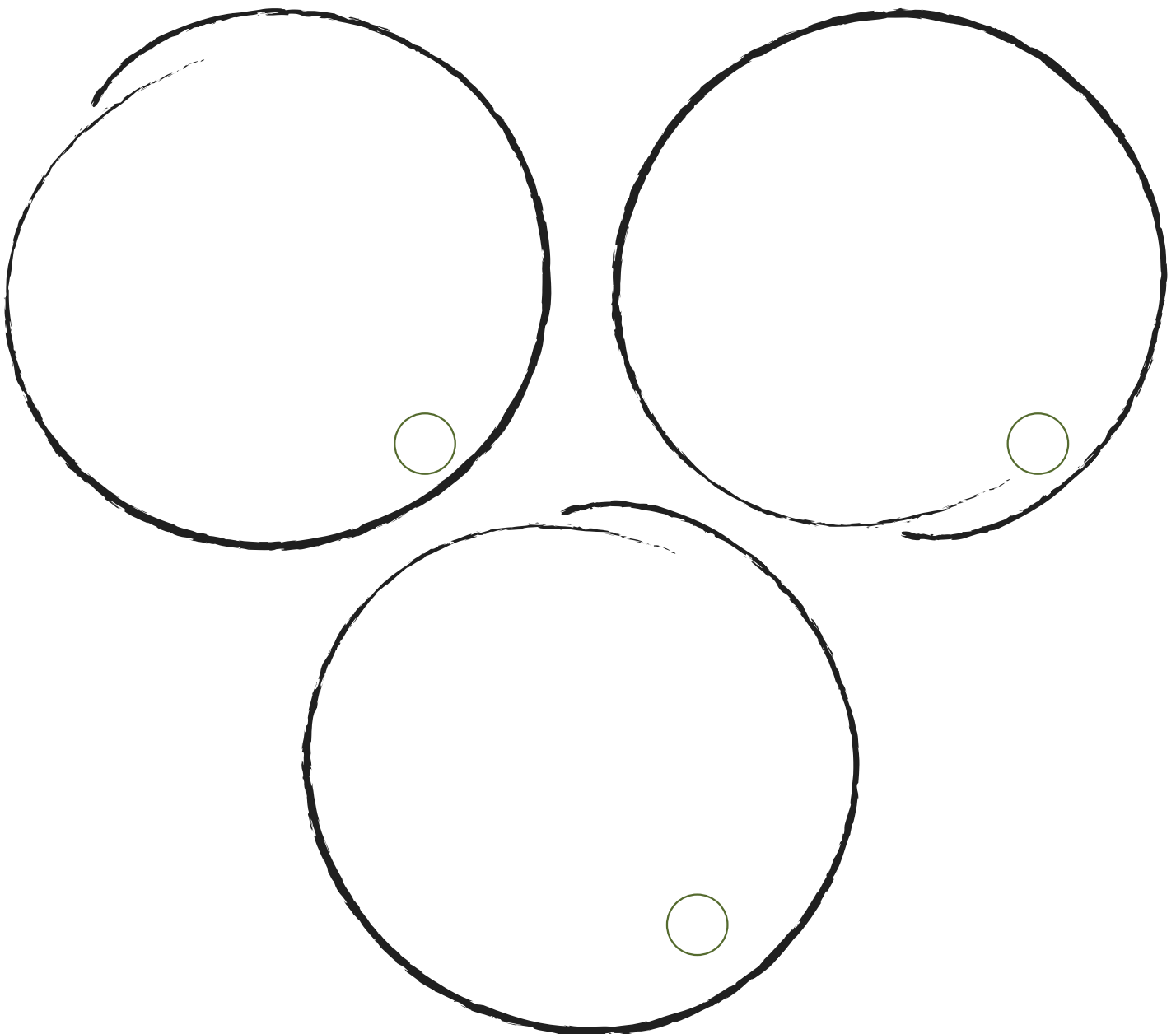


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:



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ACTION STEPS

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RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.

REFLECTION



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ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:





APRIL



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

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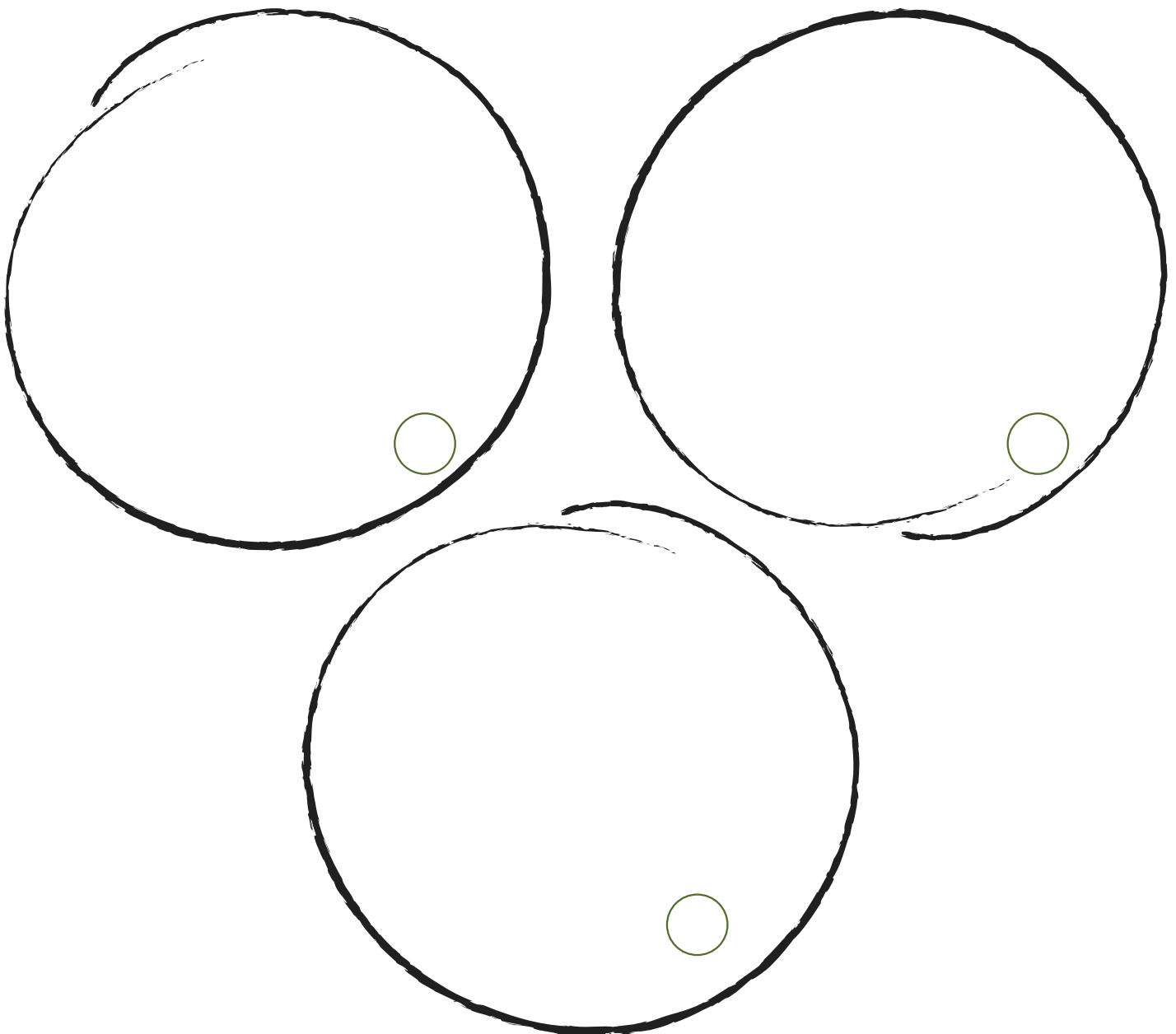
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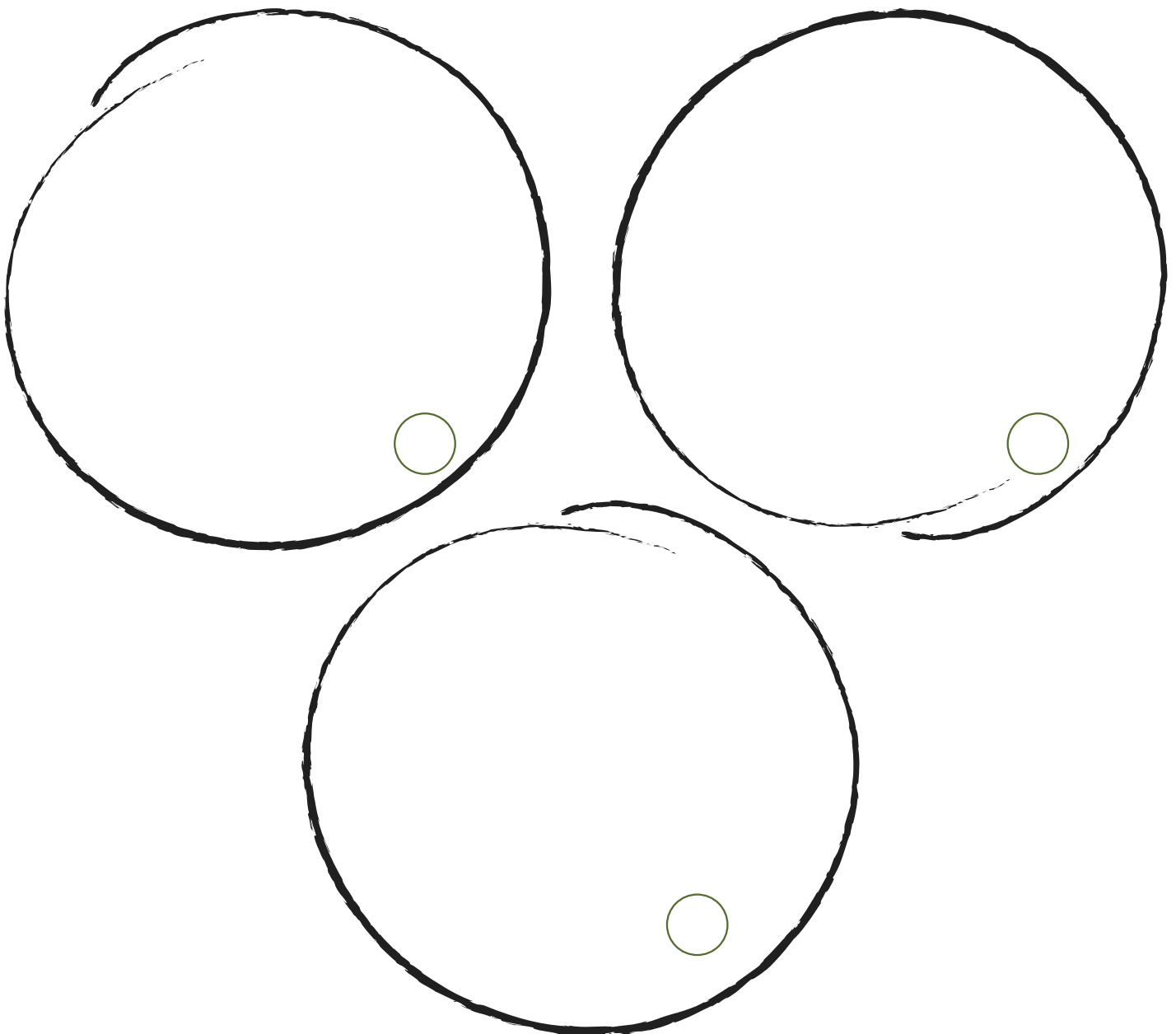


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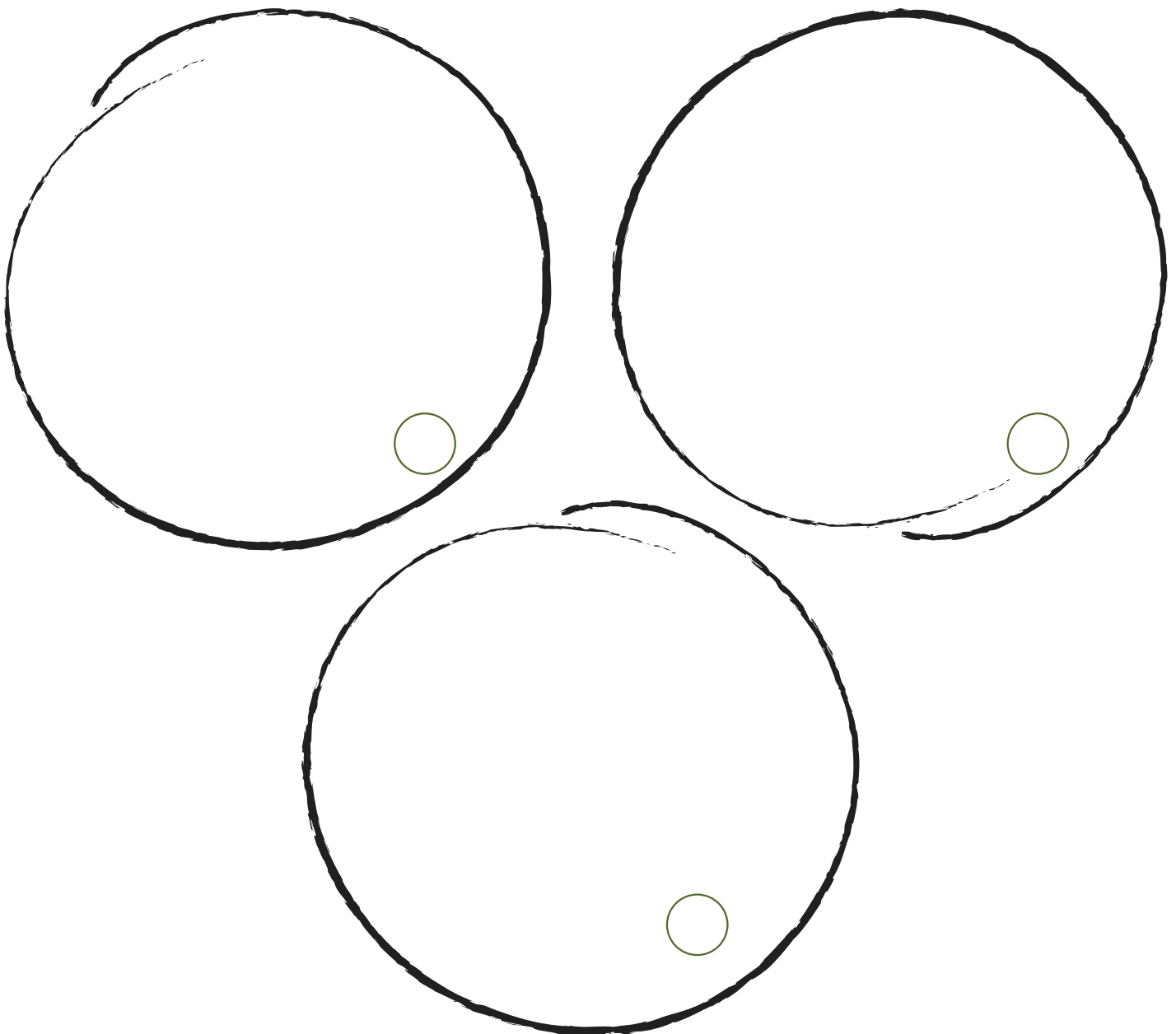


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ACTION STEPS

WEEKLY GOAL:



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ACTION STEPS

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ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:





MAY



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

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REVENUE PLAN:



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					○
					○
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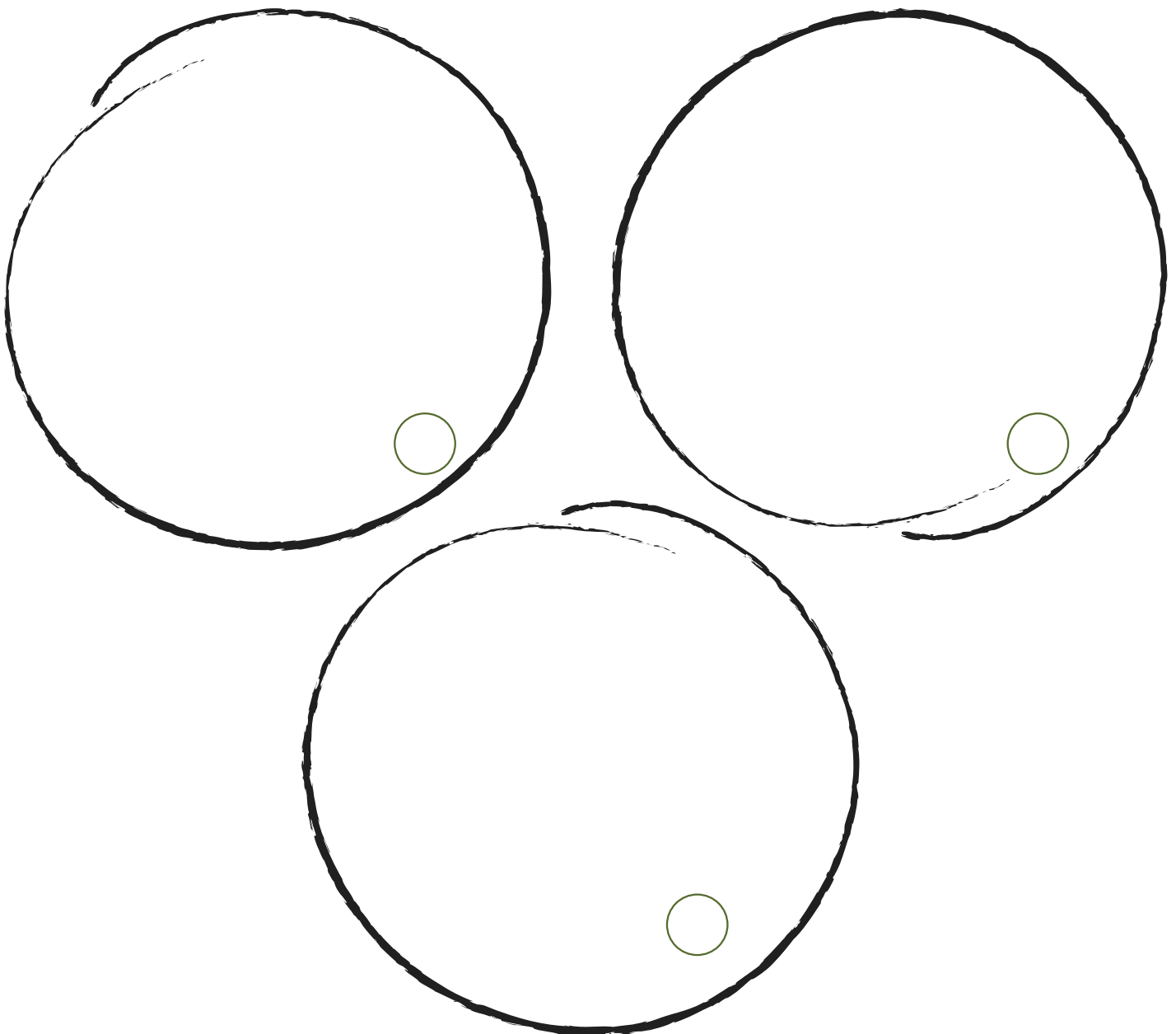
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ACTION STEPS

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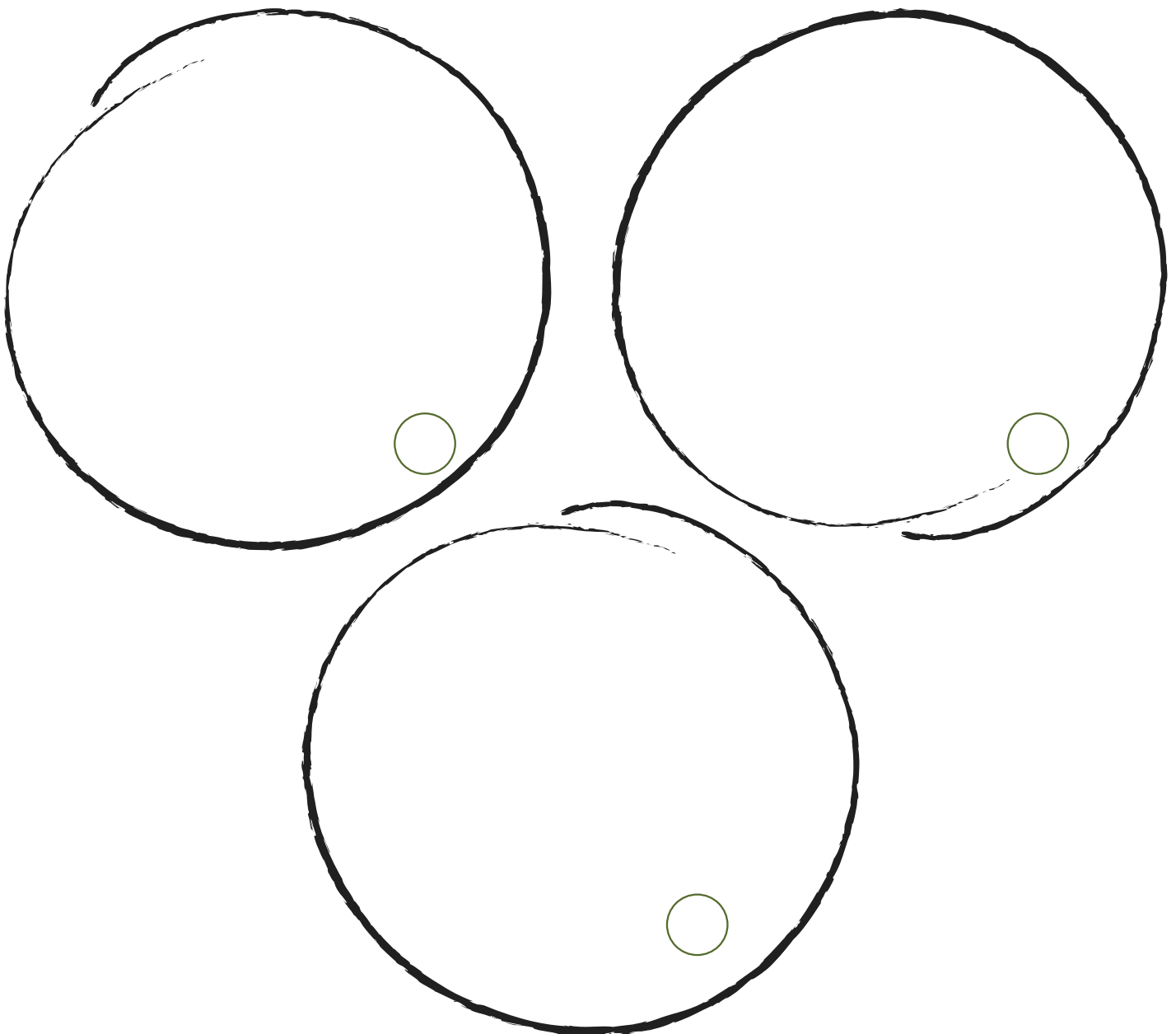


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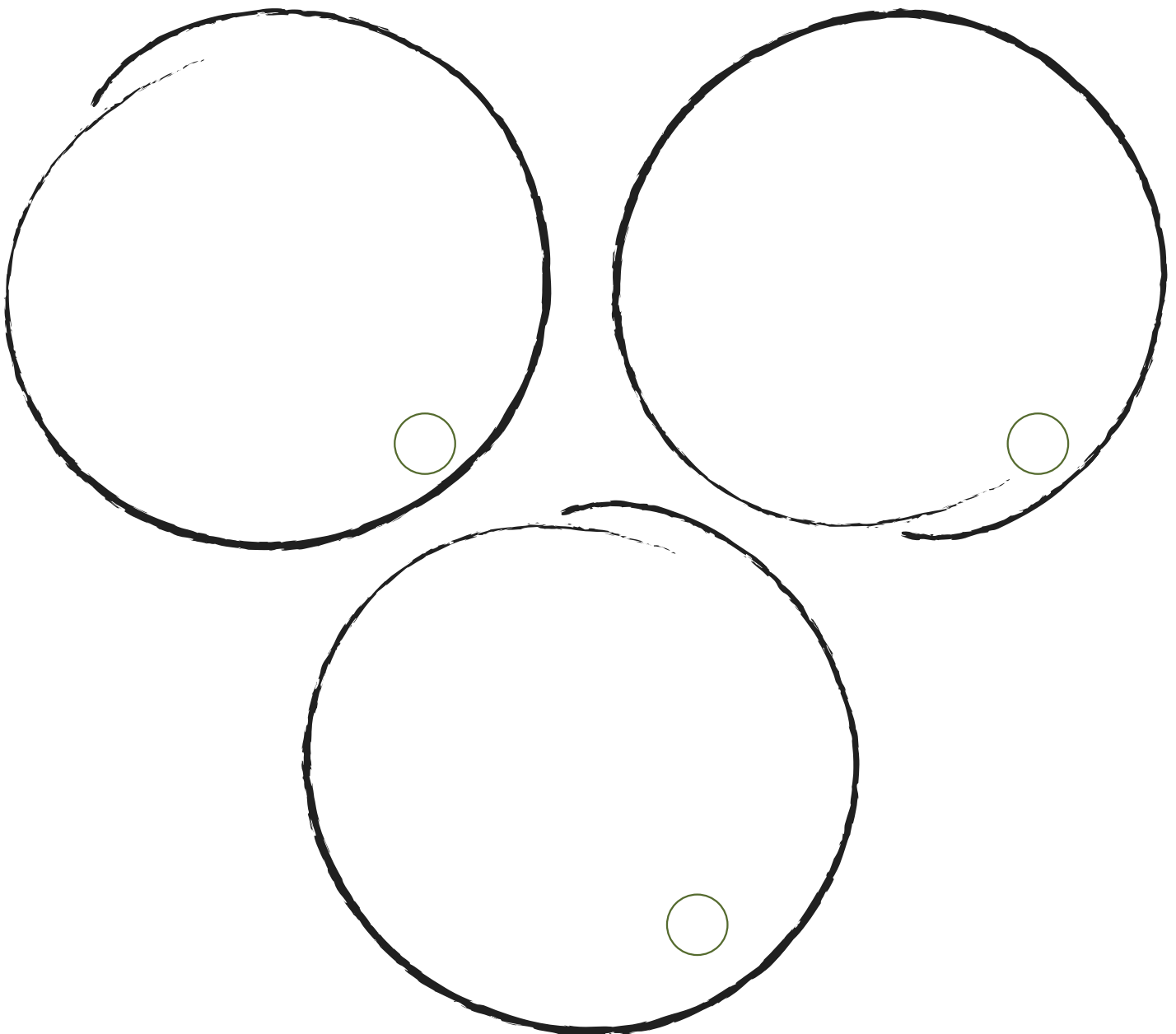


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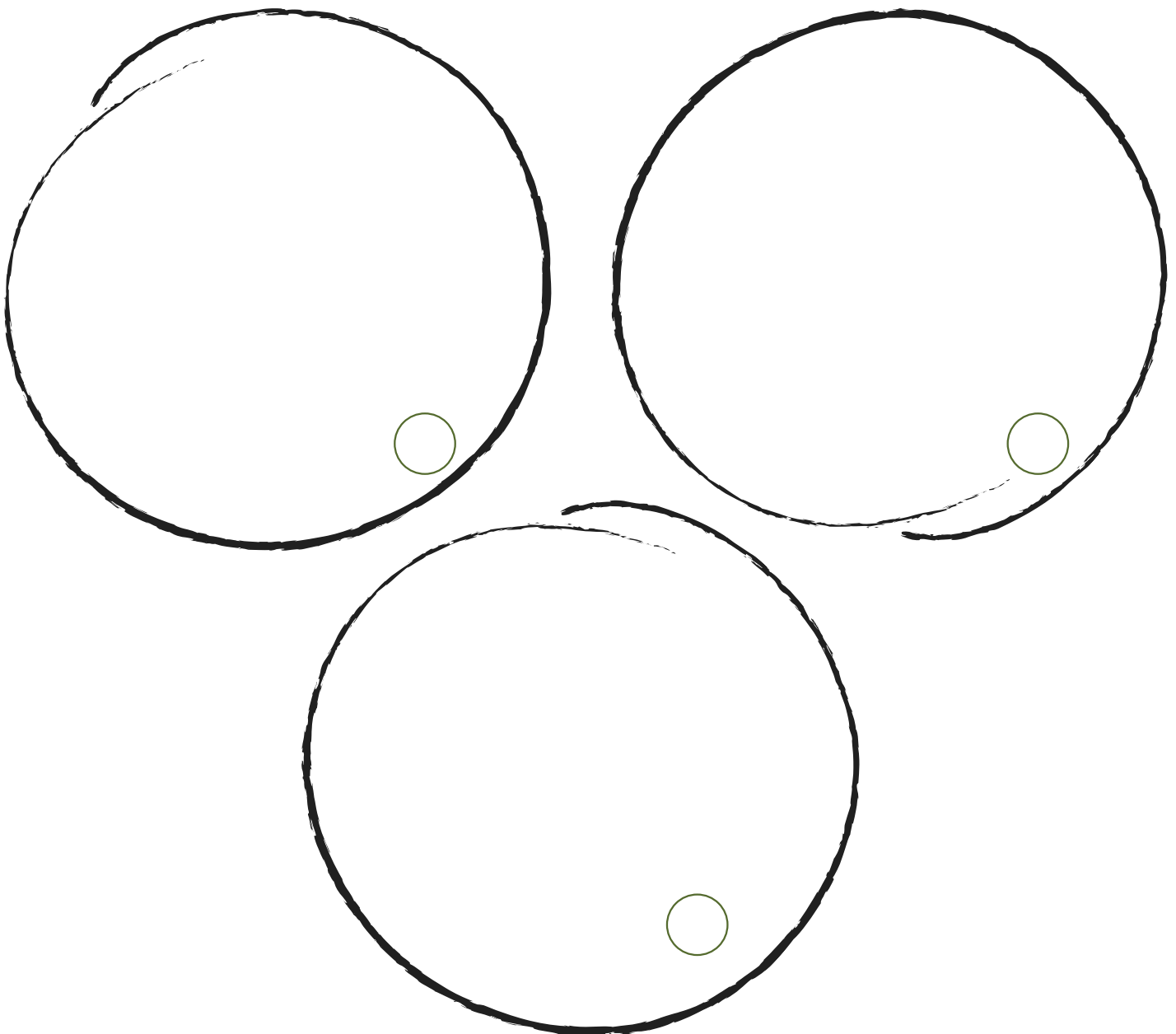


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WHICH AREAS OF YOUR BUSINESS EXPERIENCED THE MOST GROWTH OR TRANSFORMATION?

HAVE YOU ENCOUNTERED HANG-UPS IN COMPLETING YOUR ACTION STEPS? HOW CAN YOU COURSE CORRECT?

ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:





JUNE



PROFIT STRATEGY

MADE

SPENT

PROFIT

MONTHLY
GOAL

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

REVISIT YOUR VISION:

PROFIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

MAKE MORE, KEEP MORE



WHICH SERVICE THAT YOU OFFERED HAD THE GREATEST IMPACT ON YOUR BUSINESS?

WHICH SERVICE DO YOU ENJOY THE MOST?

WHAT DECISIONS CAN YOU MAKE WITH THIS INFORMATION?

WHAT WERE YOUR TOP SPENDING CATEGORIES?

DO YOU WANT TO CHANGE ANYTHING ABOUT YOUR CURRENT SPENDING?

ARE THERE ANY EXPENSES THAT CAN BE REMOVED FROM YOUR BUSINESS THAT ARE NOT BEING FULLY UTILIZED OR NOT SERVING YOUR GROWTH?



MAKE MORE, KEEP MORE

WHAT INCOME DO YOU KNOW IS COMING IN
THIS MONTH? LIST IT OUT BY SERVICE, CLIENT,
OR OTHER:

\$_____

MONTHLY REVENUE GOAL FROM "BRING IT
TOGETHER" PAGE \$_____

WHAT I NEED TO MAKE UP THE
DIFFERENCE (MONTHLY REVENUE GOAL-
KNOWN INCOME)= \$_____

REVENUE PLAN:



TRANSFERS FOR THE MONTH

ACCOUNTS:

WEEK OF	GROSS PROFIT	SALARY 50%	TAX SAVINGS 15-20%	GRATITUDE 0-5%	
					○
					○
					○
					○
					○

This worksheet is for managing cash that comes into the business. These are suggestions only and should be monitored.

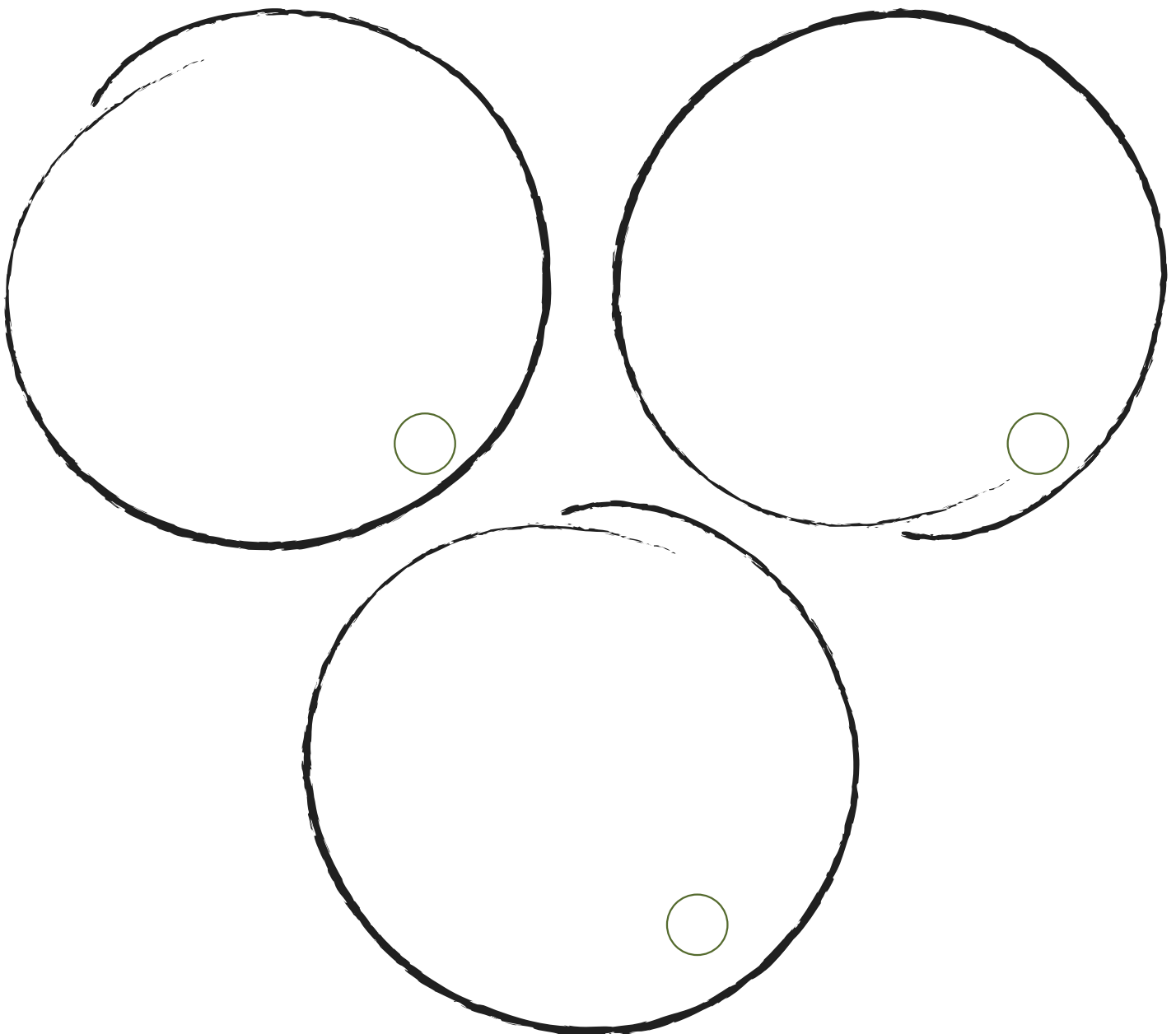
Gross Profit: Total Income - Cost of Goods
(necessary costs to sell your product or service, such as shipping of product; ingredients to make a product or goods purchased for resale)





ACTION STEPS

WEEKLY GOAL:

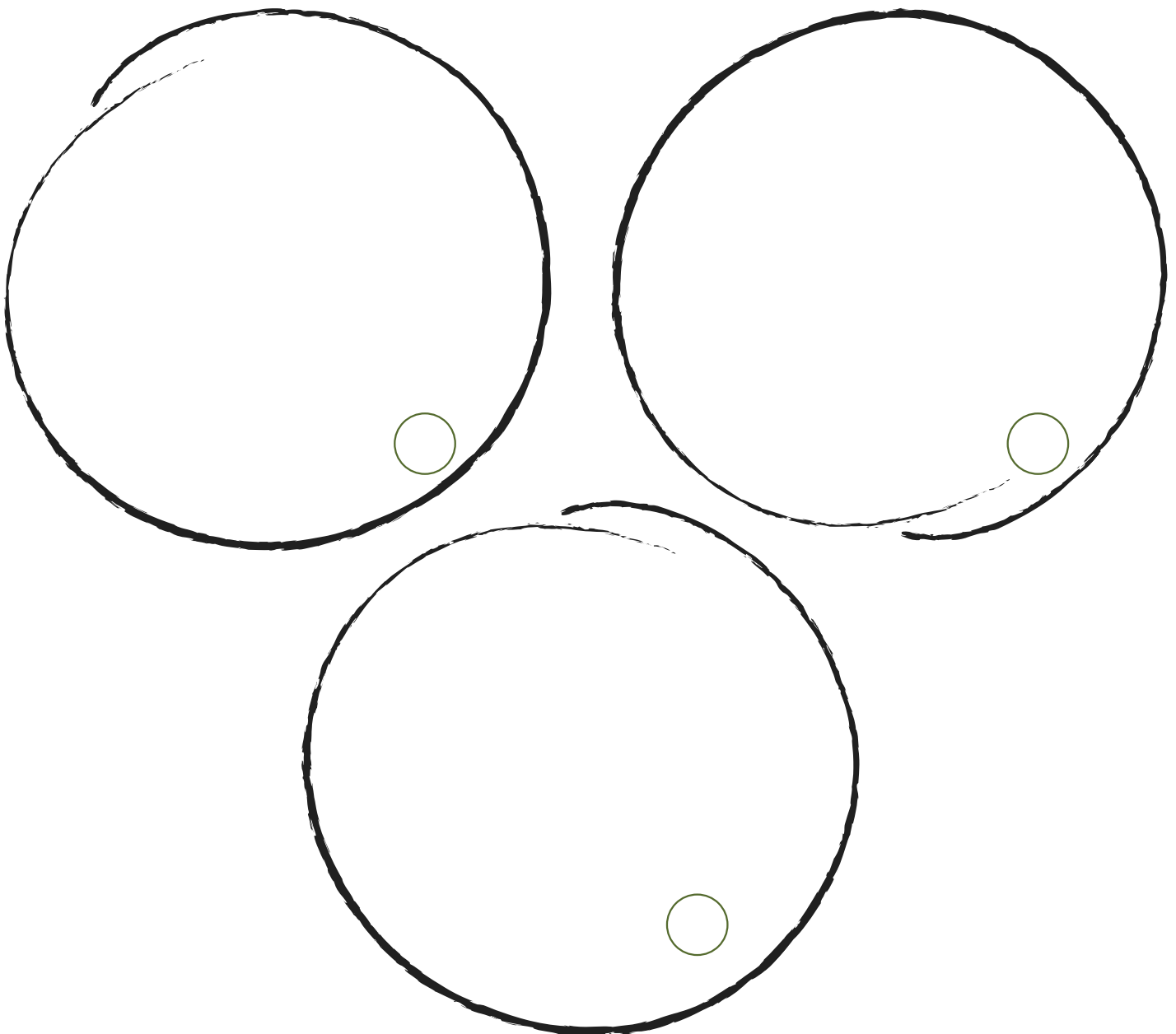


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:

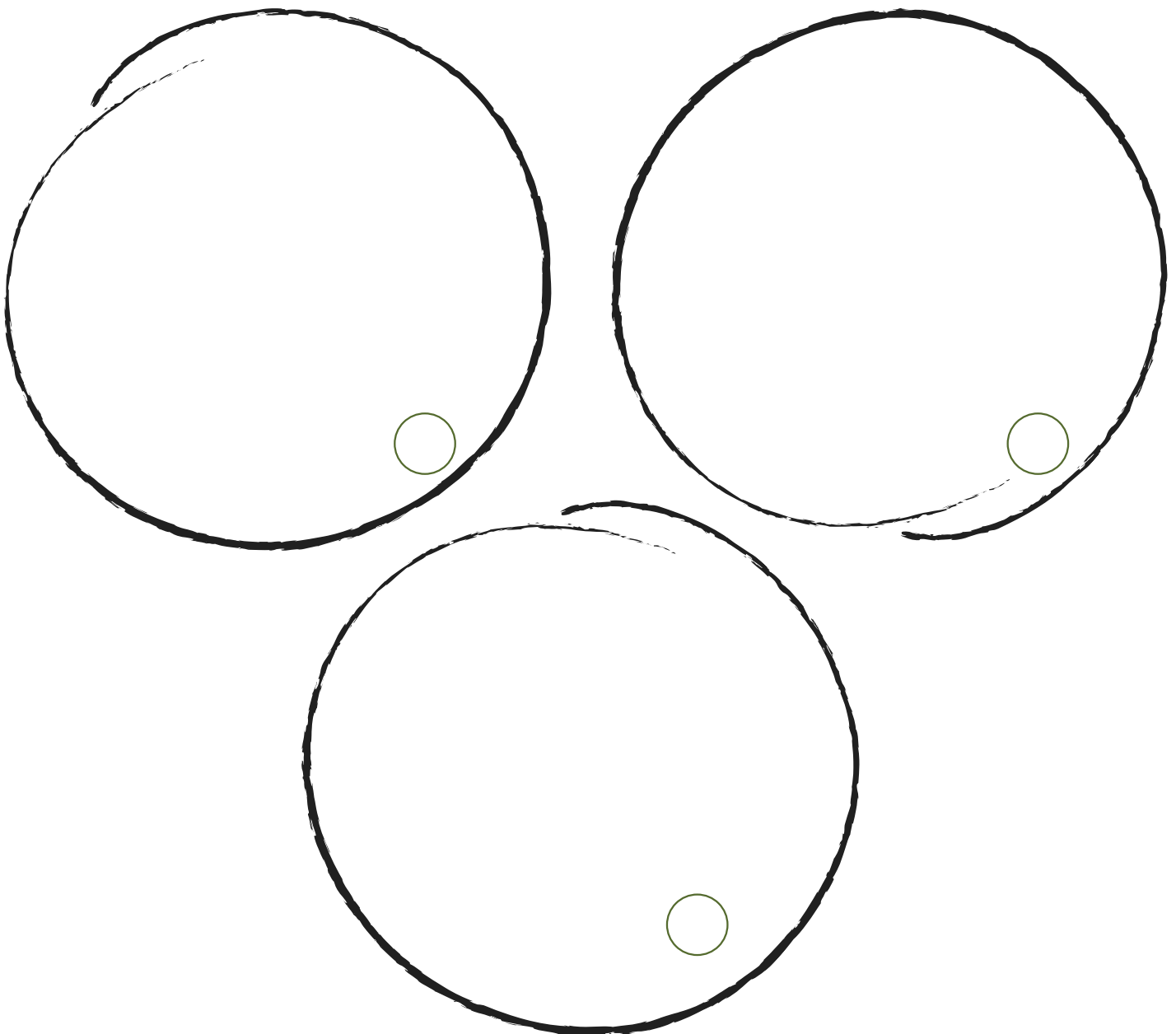


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:

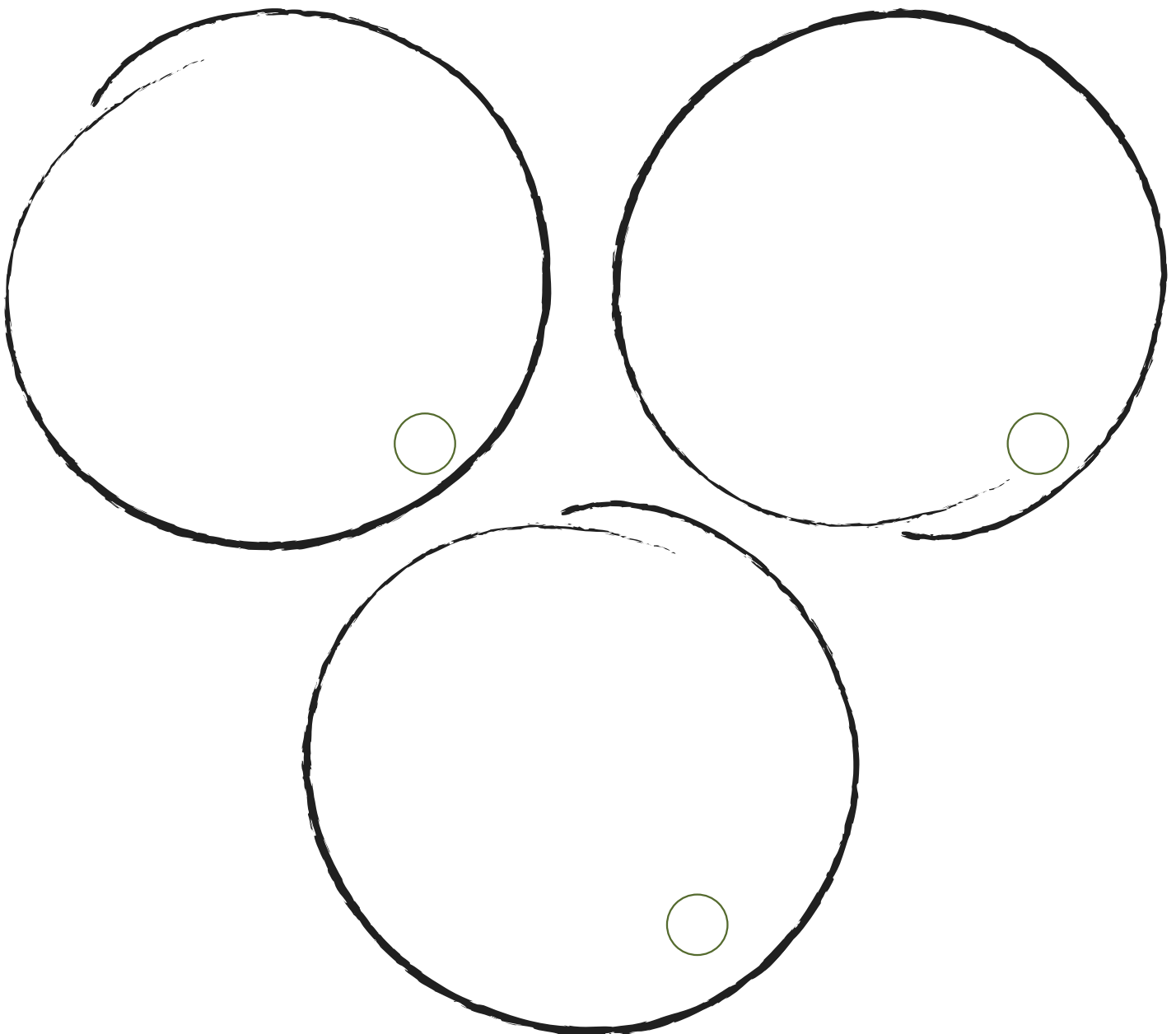


RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.



ACTION STEPS

WEEKLY GOAL:



RUN YOUR ACTION STEPS THROUGH S.M.A.R.T.

REFLECTION



LIST THREE THINGS YOU FELT REALLY GOOD ABOUT THIS MONTH:

WHICH AREAS OF YOUR BUSINESS EXPERIENCED THE MOST GROWTH OR TRANSFORMATION?

HAVE YOU ENCOUNTERED HANG-UPS IN COMPLETING YOUR ACTION STEPS? HOW CAN YOU COURSE CORRECT?

ANY PART OF YOUR VISION THAT NEEDS RE-WRITING:

