

Money Master Plan

8 Weeks to a Holistic Financial Plan

Syllabus

All bullet points are individual, bite-sized lessons. You'll have access to all the lessons in each module released at the beginning of each week, and we'll have scheduled live calls once per week to review and answer any questions you have about the material. I hope you'll join me!

Course Introduction - *Pre-Course*

- Welcome! + About Your Coach, Laura
- Pre-Course Bonus - Getting On the Same Page as Your Partner
- Before We Get Started - Action Steps!

Financial Foundations - *Week 1*

- Money Mindset
- Career/Income
- Money Buckets
- Net Worth

Tax - *Week 5*

- Federal Income Tax
- State/Local Income Tax
- Sales/Property/Other Tax
- Filing Your Return

Debt - *Week 2*

- Debt Basics
- Bad Debt
- "Good" Debt - Mortgage/Student Loans
- Credit Score/Bankruptcy

Investing - *Week 6*

- Investing Basics
- Allocation/Diversification/Risk
- Real Estate/Income Property
- Developing Your Investment Strategy

Spending Plan - *Week 3*

- Budgeting
- Tracking
- Kids are Expensive!
- Inflation/Lifestyle Creep

Insurance/Estate Planning - *Week 7*

- Property & Casualty
- Life Insurance/Annuities/LTD
- Health Insurance/LTC
- Estate Planning Essentials

Savings Plan - *Week 4*

- Emergency Reserves
- Short-Term Savings
- Long-Term Savings
- Interest

Financial Freedom - *Week 8*

- Workplace Retirement Plans
- Individual Retirement Options
- Social Security & Medicare
- Calculating Your FF number & Maintaining Your Plan