

SEVEN STEPS TO ACHIEVE YOUR FINANCIAL GOALS

adapted from Dr. Brad Klontz, financial psychologist



PROPEL
FINANCIAL ADVISORS

Step One: Write Down Three Financial Goals

_____	_____
_____	_____
_____	_____

Step Two: Passion Test your Goals

Next to each goal, rate how passionate you are on a scale of 1-10.

Step Three: Re-Name your Financial Goals

Object: Be very specific about your goal. Create a mental picture to help get you excited.

_____	_____
_____	_____
_____	_____

Step Four: Set a Goal Date

When do you want to achieve these goals?

Step Five: Picture your Financial Goals

Take your time to create a visual image of your goal. Draw it, cut it out, or download to phone wallpaper. Put the image in a place you can see daily.

Step Six: Create Sub-Accounts

Create sub-accounts and label them with your names from Step Three.

Step Seven: Automate your Success

Take action and set up an automatic deposit from your checking account.