THE WEALTH EQUATION CHECKLIST:

Find Your Purpose, Grow Your Emotional Fortitude, Steward Your Resources by Applying the Wealth Equation to Your Finances!

Imagine if everyone discovered their passion, used their resources to enhance and empower their skillset, and then had the emotional fortitude to bring solution or services to others. Everyone would be functioning at a high level in the area they enjoy. At that point, finances become holistic and creates a win-win environment for yourself, those you love, and the community around you. The key to this inner contentment starts with understanding the three main components of the Wealth Equation of Spiritual Awareness, Emotional Fortitude, and Financial Stewardship, without all three components, finances and life just doesn't add up!

Your answer can be found by understanding and applying these three areas...

	Reflect on Your Values: Take time to reflect and then write down your core values and vision for your life. What truly matters to you?
	Identify Your Passions: List activities that bring you joy and fulfillment. What are you naturally drawn to?
	Set Goals: Define short-term and long-term goals that align with your values and passions.
	Seek Feedback: Ask trusted friends or mentors for their insights on your strengths and purpose. Create a Mission Statement: Write a personal mission statement that encapsulates your purpose and aspirations. Use this statement for insight regarding future decisions.
En	motional Fortitude: Develop the resilience needed to face challenges and remain committed to your purpose and financial plan. Practice Resilience: Identify a recent challenge and write down how you overcame it. What did you learn? Are there key areas times of the year, or situations that typically throw you off track?

	Set Boundaries: Identify areas in your life where you need to say "no" to protect your emotional well-being. There can be varying degrees of separation. Take time to write and rehearse your boundary setting conversations.
	Cultivate Gratitude: Maintain a gratitude journal, writing down three things you're grateful for each day. Studies show this is especially beneficial at the end of your day.
	Seek Support: Identify a therapist or support group to help you navigate emotional challenges. There are also numerous books and podcasts that can be used as resources.
Fi	nancial Stewardship: You have the ability to create wealth for yourself and those you love but you must be intentional.
	Create a Spending Analysis: Track your income and expenses to understand your financial situation. Identifying the starting point allows you to track your progress regardless of your financial level. Analyzing your taxes, bank statements, and all financial documents allow a clear understanding of your current position. Done properly, it can also help project future outcomes.
	Set Financial Goals: Define specific, measurable financial goals (e.g., saving for a vacation, paying off debt, systematically investing, purchasing a business, a second home).
	Develop a Savings Plan: Set up automatic transfers to a savings account for emergencies and future goals. Make sure your money is working as hard as you, even in the savings accounts.
	Review Investments: Evaluate your current investments. Do you know what you own and why you own it? What is the strategy behind each piece? Are they in alignment with your financial goals and risk tolerance?
	Seek Professional Advice: Consider consulting a Certified Financial Planner® who has effectively used the Wealth Equation to create a Cash Flow Confidence Plan.

With over 25 years of experience as a Certified Financial Planner®, and over a decade training Investment and Insurance Advisors, I understand the emotional rollercoaster you can experience while trying to integrate your values and purpose within your financial goals. It seems selfish to believe your money should align with your God given purpose. But as you become Crystal Clear on your purpose, and use your resources to invest in personal development and skillsets, your ability to provide solutions and value to others increases. This provides impact on the lives of those you serve and strategies that can enhance their lives. This creates a win-win environment.

Are you ready to align your finances with your God-given purpose and create a win-win environment for yourself and those around you? Schedule an initial conversation with me today to discover how the Wealth Equation is used with the Cash Flow Confidence Plan to transform your financial journey. Together, we'll explore the three essential components—Spiritual Awareness, Emotional Fortitude, and Financial Stewardship—that will help you achieve wealth and fulfillment. Don't wait; take the first step toward a life where your finances truly reflect your values and purpose!



www.crystalclearfinances.com | (518) 433-7181

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