



December 3, 2020

I really dislike packing and unpacking before and after trips. 📦 Can you relate to that at all? My wife would tell you that I often pack at the last minute and procrastinate unpacking after a trip. 😬

Imagine taking your suitcase to your closet to pack for a really big trip that you've been anticipating for years... but with a few problems:

- 👉 you don't know where you are going
- 👉 you don't know when you are leaving
- 👉 you don't know how long you'll be there
- 👉 you don't know what you will do there

HOW WOULD YOU KNOW WHAT TO PACK??

Unfortunately, this is exactly how most of us approach our financial life.

No clear goals, no destination, no timeline.

That means you could easily be “packing” the wrong stuff in your financial life. All warm winter clothes but your destination is tropical! 🌴

Everything starts with clear goals. 🎯

Once you have clear goals, clear timelines, and a real plan for what experiences and lifestyle you are aiming for, you and your fiduciary advisor will know exactly “WHAT TO PACK!” 📦

If you want to schedule some time to talk with your team about your goals as we head into the new year, click the blue button below and pick a time that works!

P.S. Thank you again for your support in buying my new book *["Stress Free Money"](#)* (available on Amazon). 88 of you have already left a book review on Amazon. THANK YOU!! Also, the AUDIO BOOK version came out this month as well (on amazon and audible.com).

Sincerely,


WEALTH ADVISOR FOR ENTREPRENEURS

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