



December 15, 2024

Dear [FIRST NAME GOES HERE],

Quick question:

What's your main financial goal?

And before you say "make more money"...

Let me stop you right there.

That's not a real goal.

That's like saying your fitness goal is to "be healthier."

Too vague.

Too fuzzy.

Too undefined to produce results.

Vague goals lead to only one thing...

Vague results.

I've seen and heard this my entire career in wealth management.

Ambitious entrepreneurs and investors come in, they hand us their investment account statements, and ask:

"Can we do better?"

And our immediate question is:

"Better compared to what?"

"What's this money earmarked for?"

"What do you want your money to do for you?"

Without a SPECIFIC target to aim for, you're just shooting in the dark.

That's how people end up taking unnecessary risks...that lose them A LOT of money.

So let's fix that right now.

Whether you're trying to scale your business or income on your investments...

Here's a simple framework we use to set specific and tangible goals with our high-net-worth clients:

- 1. State your goal
- 2. Add "SO THAT..."
- 3. Get specific

Example:

BAD GOAL: "I want to grow my wealth next year."

GOOD GOAL: "I want to generate \$50K/month in passive income by December 2025 SO THAT beginning in 2026, I can spend 3 months a year traveling with my family without worrying about our bills."

See the difference?

The second one gives you:

- A clear target (\$50K/month)
- A deadline (December 2025)
- A meaningful PURPOSE (family time and travel)

Now it's your turn, [FIRST NAME GOES HERE]:

Take 2 minutes right now and write down:

- 1. What's your specific financial or business goal?
- 2. By when do you want to reach it?
- 3. WHY is this important to you? (the "so that")

Having trouble getting specific?

That's normal.

Most people feel stuck when trying to nail down exact numbers.

But here's the thing...

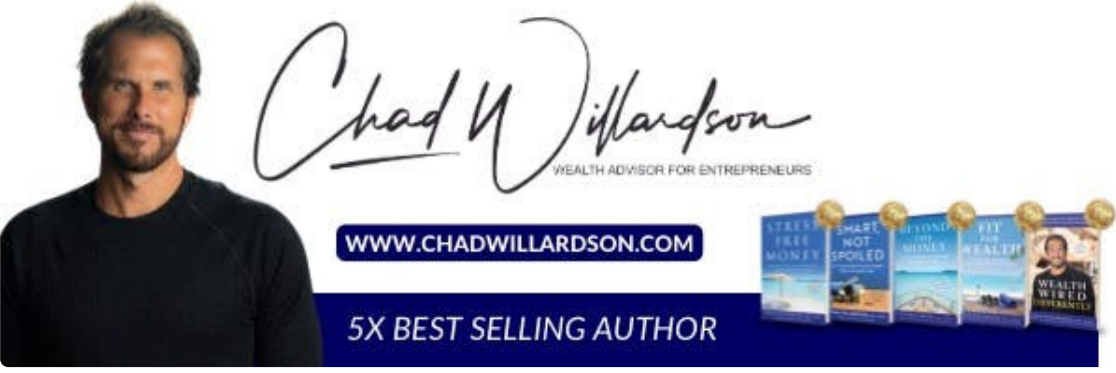
You can't hit a target you can't see.

So take the time to do this right so you have something to aim for.

To your focused success,

Chad

Speaking of getting specific with goals... [On the Warrior Dad Podcast](#), I share how I went from vague goals to hitting precise targets in both fitness AND finance. Learn why setting "ridiculous" goals changed everything for me and how it can do the same for you.



P.S. Hope you and your family are having an awesome holiday season so far! Pretty remarkable to pause and think how quickly 2024 has passed by. We are grateful for good health and our family these days!



P.P.S. If you want to be pushed and supported to achieve your wildest ambitions in business, money, health, and relationships, or simply ELEVATE every aspect of your life, then ELEVATED 2025 might be just what you need. [Schedule a call](#) with my team and see if you've got what it takes to join an incredibly ambitious community of entrepreneurs who are winning in both business and at home!

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