

CORE VALUES

Your values create the foundation for your decisions. This section helps participants clarify their moral code and evaluate the intentionality behind their decision-making to create internal motivation for their actions.

Recognizing Your Worth

Core Competencies Covered in **Red**

Important Principles & Characteristics

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Compounding Decisions

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Risk & Return: Guiderails vs. Shortcuts

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

YOUR STORY

Maximizing Your Strengths

Everyone has a story. It can either hold you back or propel you forward. This reflective workshop guides participants through connecting the dots of their past experiences so they can discover correlations for the ups and downs of their life.

Core Competencies Covered in Red

Self-Awareness & Communication Style

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Natural Talents & Gifts

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Careers of Interest

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

FUTURE SELF

Forecasting Your Potential

Let's fill in the gaps of where you are vs. where you want to be. This session helps participants cast a vision for their future and address the pivots necessary to reach their definition of success. I have to give the disclaimer: "Past performance is no guarantee of future results."

Core Competencies Covered in **Red**

Mapping Out Vision

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Defining Success

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Area of Growth & Development

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

MISSION STATEMENT

Align your everyday actions to your bigger picture goals. Through creating a personal mission statement, participants will have a gauge on whether they are budgeting their time, energy, and finances with what's important to them.

Allocating Your Resources

Core Compencies Covered in **Red**

Aligning Everyday Decisions

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Balancing Time & Talents

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Connect Values, Actions, & Purpose

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

PURPOSE DRIVEN GOALS

Planning for Financial & Personal Success

Time to execute! This final session helps our participants articulate actionable next steps to develop a personalized plan to get closer to their long-term personal & financial goals.

Core Competencies Covered in Red

Creating an Action Plan

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

SMART Criteria

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit

Barriers, Factors, & Accountability

Self-Awareness	Self-Management	Responsible Decision-Making	Relationship Skills	Social Awareness
Risk Management	Earning, Spending, Saving	Budgeting	Investments	Borrowing & Credit