

Let's Make Wealth Fair Course

Syllabus



👉 Sign-up!

letsmakewealthfair.com

Summary

- **Subjects:** Personal Finance & Goal Setting, Investing, Savings, Cashflow, Networth, Emergency Fund, Budgeting Joyfully
- **Suggested Target Audience:** Adults aged 18 - 45
- **Objective:**

This interactive course offers a deep dive into personal financial management with a focus on creating healthy financial habits. Participants will learn how to conduct a personal gap analysis, manage money effectively, prepare for emergencies, invest wisely, save strategically, and spend joyfully, all while building a personalized financial plan.

- **Time Allotment:** 5 Hours

Course Format

- Virtual sessions with a combination of lectures, Q&A, and hands-on activities
- Hands-on use of the Let's Make Wealth Fair Workbook
- Use of real-time polls and breakout rooms for interactive learning

Materials Provided

- Digital workbook to guide and document progress
- LMWF Online Course for reading and homework

Technology Requirements

- Access to a computer (webcam and microphone optional)
- Stable internet connection with Zoom installed and updated

Sessions

Session 1: Envision the life you want and assess if your cashflow is aligned with your goals

Objective: Envision the life you want, assess where you're at today, and determine the steps to close the gap. Then, assess your current cashflow to see if it's helping or hindering your goals to build the life you want

Duration: 95 Minutes

1. Welcome and Introduction

- Course Objectives
- Interactive Audience "Top of Mind" discussion

2. Gap Analysis

- Envisioning your financial future
- Assessing your current financial status
- Identifying gaps and creating action plans

3. Money Management Basics

- Identifying income streams
- Tracking and categorizing expenses
- Best practices for cash flow management

Suggested At Home Action items		Resource 1	Resource 2	Resource 3
Read				
1	Program Overview	Online Course*	Book	iOS App
2	Gap Analysis			
3	Money Management			
Take Action				
		Resource 1	Resource 2	
1	Complete Gap Analysis	iOS App	Workbook*	
2	Complete Cash Inflows			
3	Complete Cash Outflows			
Bonus Actions				
1	Automate bill payments	*Online Course & Workbook included in course. iOS App, Book, and additional Online Courses as Workbooks can be found at letsmakewealthfair.com		

Session 2: Foundations of financial security and making money work for you

Objective: Learn where to direct your cash flow to help you achieve the life you envisioned from the gap analysis

Duration: 100 Minutes

1. Emergency Funds

- The importance of emergency funds
- How to calculate your needs
- Strategies to build and maintain an emergency fund

2. Investing Principles

- Basics of investing
- Creating a personalized investment budget
- Understanding and automating your investments

3. Effective Savings Strategies

- Savings 101: Establishing good habits
- Setting and achieving savings goals
- Automating your savings plan

Suggested At Home Action items		Resource 1	Resource 2	Resource 3
Read				
1	Emergency Fund	Online Course*	Book	iOS App
2	Investing			
3	Savings			
Take Action				
		Resource 1	Resource 2	
1	Refine Emergency Fund Calculations	iOS App	Workbook*	
2	Finalize investing goals			
3	Finalize savings goals			
Bonus Actions				
1	Begin building Emergency Fund	*Online Course & Workbook included in course. iOS App, Book, and additional Online Courses as Workbooks can be found at letsmakewealthfair.com		
2	Automate Investments			
3	Automate Savings			

Session 3: Maximizing financial well-being (with joy!)

Objective: Make sure you're treating yourself with the money you've earned in a way that's aligned with your values and your goals. Then iterate on your financial plan periodically to ensure you're on track to realize the life you've dreamt about.

Duration: 85 Minutes

1. Joyful Spending

- Aligning spending with personal values
- Creating a budget for happiness
- Mindful spending practices





2. Finalizing Your Financial Plan

- Reviewing key course takeaways
- Constructing the first version of your financial plan
- Gathering feedback and sharing resources for continued learning

Suggested At Home Action items		Resource 1	Resource 2	Resource 3
Read		Online Course	Book	iOS App
1	Joyful Spending			
2	LMWF Summary and Overview			
3	Conclusion of Course			
Take Action		iOS App	Workbook	
1	Finalize Joyful Spending			
2	Review plan			
3	Make adjustments			
Bonus Actions		1x1 Financial Coaching	support@letsmakewealthfair.com	
1	Consider 1x1 Financial Coaching			
*Online Course & Workbook included in course. iOS App, Book, and additional Online Courses as Workbooks can be found at letsmakewealthfair.com				

Resources

The Let's Make Wealth Fair Approach has been adapted to a variety of formats to meet many learning styles and to meet you where you're at

Product	Description	Where to buy
<p>iOS App</p> 	<p>Crafted to guide you through the fundamentals of personal finance on your mobile device while providing insights to your own personal finance journey</p>	<p>https://apps.apple.com/us/app/lets-make-wealth-fair/id6446957565</p>
<p>Online Course</p>  <p>Included in live course</p>	<p>Self-paced online course designed to teach personal finance concepts from the comfort of your desktop. Includes the LMWF Workbook</p>	<p>https://www.letsmakewealthfair.com/challenge-page/b5046a90-a381-4a06-bf8f-17fa6acc7ef5</p>
<p>Workbook</p>  <p>Included in live course</p>	<p>Spreadsheet that allows you to easily enter your financial budget, goals, and ultimately design the life you envision. Companion to the online course and book</p>	<p>https://www.letsmakewealthfair.com/product-page/lets-make-wealth-fair-workbook</p>
<p>Book</p> 	<p>Step into a narrative that redefines wealth with our practical book. Each page is a step towards understanding your finances, armed with practical wisdom and actionable guidance</p>	<p>https://www.amazon.com/Lets-Make-Wealth-Fair-actionable-ebook/dp/B0BQHFWY1Q/ref=sr_1_1?crid=1S2JOR778IWMD&keywords=Lets+make+wealth+fai&qid=1680834069&srefix=lets+make+wealth+fai%2Caps%2C232&sr=8-1</p>

How to Sign-up For Course

Sign-up for our next course using the QR Code below:



You may also sign-up for the next course by visiting this link:

https://www.letsmakewealthfair.com/booking-calendar/let-s-make-wealth-fair-live-course?utm_medium=page_links