

WEALTH BY DESIGN

YOUR BLUEPRINT TO REAL WEALTH + SECURITY



TOUJOURS PLANNING

Right now, you're in what they call the "feast" cycle of your business. As a modern biz owner / entrepreneur / empire-builder, you're seeing a drastic increase in revenue, you're growing, and you might even have a team helping you scale even faster. This, our friend, is the best of times.

Maybe you've used all the cash you're making to pay off student and/or business loans, book that boss vacation, or finally feel like you finally have enough cash to live comfortably. Your savings has grown exponentially, you've raised your own salary, paid your taxes on time (right?!), and things are feeling abundant AF.

But you're reading this for a reason... maybe because you know that long-term financial independence is that last #adulting piece you need to master. Maybe you want to up the impact you have on the world, or ensure the stability of your business (and those who benefit from it). Maybe you want to build the wealth you need to feel more freedom in the future. Maybe you want to live a work-optional lifestyle. Or maybe you want all of that — and you want it without worrying about your business supporting you.

Are you nodding your head "yes!" yet?

Despite the fact that you're absolutely killing it in business, you want to feel independent (now and in the future) and to know that you're going to be able to grow your business, take care of yourself, and get out of the cycle of the hustle and grind hamster wheel.



So, what's standing in your way?

You never really learned the in's and out's of money. They definitely didn't teach this in school.

The current state of the economy and politics is making you nervous. You're not sure your business or your personal finances would do so hot if we face another 2008-level recession.

You've spent so long in the debt cycle that you're not sure what you do with money when you're out of it. Everyone else seems to be throwing their money at property they can list on AirBnB, or on another trip to Bali.

It feels like people are coming out of the woodwork asking for money. You want to help your fellow entrepreneur, but is it a good idea to invest in their projects?

Everyone gives different advice and you don't know who to trust: your bookkeeper, your friend who plays at penny stocks, your CPA, your friend who hired a financial advisor that one time?

You know you need to start saving for retirement — or for that work-optional lifestyle — but you can't seem to make the progress you want to make on your BHGs (big hairy goals).



We call this the “Mo Money, Mo Problems” Phenomenon


Biggie had it right: when you make more money, it seems like there's just “more” that goes along with it — more to learn, more to do, more problems to solve, and just more money to track. You're wondering what the “right” answer is, and how can you handle the buckets of money you're making like a freakin' boss. But as you start to create more stability in your business revenue and personal income, your biggest thought is likely: What should I be doing NOW to make sure things are good LATER?

Add all that to the fact that we wake up to daily news reports about a slowing economy, fears about a

looming recession, and friends freaking out over how it could impact our businesses. The result? You're stuck. You're in a holding pattern. And basically, you're still sitting on your □. Sure you're keeping “busy” — distracting yourself with business tasks, with what you know, with what is easy. Because that's more money, right? This keeps you on that hamster wheel of entrepreneurship, and stops you from hitting those goals or feeling those juicy feelings of independence.

Sorry to say it, but we have a problem with that. (We also have a way to fix it.)

The “If it’s not broken, don’t fix it” mindset is gonna get you.



Let’s be real. Part of the reason you love what you do is the excitement. You love doing new things, having new ideas, and watching them grow with your special brand of TLC. But just because you like the novelty of business doesn’t mean you like the novelty of an unpredictable future.

You KNOW that the world of entrepreneurship is a rollercoaster. There are epic highs and there’s the potential for really deep lows. Lows that you need to be prepared for — beyond just starting another business or planning another launch that you hope goes well. We’ve all seen businesses crash and burn what seems like overnight and we know you know (maybe deep

down) that you can’t rely on your biz income if things go sideways.

Maybe you’re also starting to worry about the economy and our political climate and how it will impact the nature of your business long-term. Since the financial crisis in 2008, the stock market has been steadily increasing, but a recession is inevitable — really. We’re not trying to scare you, but recessions happen (on average) about every 5 years, according to the National Bureau of Economic Research. Recessions are just a reality of the market.

But have you ever thought about what may happen if another recession hits? ... no? Are you squirming right about now?