

FINANCIAL WELLNESS STARTUP KIT

Build a solid financial foundation in 30–90 days.





Tier 1: DIY Financial Wellness Starter Kit

Best for: Self-starters who want tools to manage their money on their own.

Take control of your finances at your own pace with our **DIY Starter Kit**—a fully editable, easy-to-use digital bundle that helps you get organized, track your goals, and build your financial foundation.

-  Net worth tracker
-  Monthly & weekly budget templates
-  Debt payoff planner (snowball & avalanche options)
-  Savings & sinking fund tracker
-  Income tracker
-  Investment overview sheet
-  Financial goals worksheet
-  Printable and fillable formats

Perfect for those ready to take the first step toward financial clarity—without the pressure of coaching.



Tier 2: 1:1 Financial Reset Strategy Session

Best for: Individuals who want expert guidance to jumpstart their journey with a clear plan.

1

Need Direction?

This one-time, 60-minute **Financial Reset Strategy Session** helps you get unstuck.

2

What You Get:

- ✓ A private 60-minute 1:1 call
- ✓ Full access to the **DIY Starter Kit**
- ✓ Personalized financial assessment
- ✓ Custom 90-day Financial Reset Roadmap
- ✓ Budget & debt strategy overview
- ✓ Goal clarity and next-step guidance

3

Get a Plan!

Walk away with a practical 90-day roadmap tailored to your goals.

4

Gain Confidence!

You'll leave with clarity, confidence, and a plan you can start using right away.



Tier 3: Full 90-Day Financial Wellness Program

Best for: Individuals ready for full support, guidance, and accountability on their financial journey.

This immersive 90-day coaching program is your complete financial reset. It includes everything from Tier 2—plus two additional strategy sessions, weekly or biweekly accountability check-ins, direct messaging support, and exclusive bonus resources.

What's Included:

-  Everything in Tier 2
-  (2) Additional 1:1 coaching sessions (total of 3)
-  Weekly or biweekly check-ins (Zoom or voice notes)
-  Direct email/text support throughout the program
-  Customized budget, savings, and debt elimination plans
-  Access to tools library + bonus **Mindset & Money Workbook**
-  Ongoing accountability to help you stay on track

This tier is ideal for people who are serious about transforming their money mindset, eliminating chaos, and finally building sustainable financial habits with the support they deserve.

Your Path to Financial Wellness: Our Program Tiers

Our financial wellness programs offer distinct tiers, from a self-paced DIY kit to personalized 1:1 coaching and a comprehensive 90-day immersive program, designed to meet diverse needs for clarity and growth.

Tier 1: DIY Financial Wellness Starter Kit

Self-paced tools for gaining financial clarity and managing your money.

Tier 2: 1:1 Financial Reset Strategy Session

Expert guidance to jumpstart your journey with a clear, personalized 90-day roadmap.

Tier 3: Full 90-Day Financial Wellness Program

Comprehensive support, guidance, and accountability for a complete financial transformation.

