



Money Energy Opportunities Discovery

The following questions relate to specific opportunities which can create exponential stored money energy. These questions are categorized into two main sections: Your Financial Flexibility, encompassing Questions 1-13, and The Potential of Your Human Capital, covering Questions 14-26.

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Section 1: Your Financial Flexibility

Answer Questions 1 - 13 on the following basis: 1 = Not at all | 2. = Hardly at all | 3. = To a small extent | 4. = Average | 5. = To a moderate extent | 6. = For the most part | 7. = To a very great extent

- 1. Positive Surplus Cashflow 6 / 7
- 2. Margin of Safety 7 / 7
- 3. Secure Long-Term Earnings Stream 6 / 7
- 4. Debt Management 7 / 7
- 5. Capital Pool 7 / 7
- 6. Opportunities Fund 7 / 7
- 7. Retirement Fund 7 / 7
- 8. Diversification 7 / 7
- 9. Economic Disaster Planning 7 / 7
- 10. Known Future Windfalls 7 / 7
- 11. Insurance Protection 7 / 7
- 12. Long Term Financial Commitment Coverage 7 / 7
- 13. Written Goals-Based Financial Plan 7 / 7

Section 2: The Power of Your Human Capital

Answer Questions 14 - 26 on the following basis: 1 = Not at all | 2. = Hardly at all | 3. = To a small extent | 4. = Average | 5. = To a moderate extent | 6. = For the most part | 7. = To a very great extent

14. Identity Clarity	7 / 7
15. Money Purpose Clarity	7 / 7
16. College Education	6 / 7
17. Multiple Career Path Opportunities	7 / 7
18. Risk Tolerance Awareness	7 / 7
19. Financial Education	7 / 7
20. Greed Management	7 / 7
21. Continuous Life Learning	7 / 7
22. Relationship Capital	7 / 7
23. Contributing Beyond Yourself	7 / 7
24. Personal Energy Management	7 / 7
25. Robust Health	7 / 7
26. A "You" Centered Life Support Team	7 / 7
The Power of Your Human Capital Calculations	6.92
Overall Average Score	6.89
Total Score	179

Boosting Your Money Energy: Step-by-Step Approach

The overall Money Energy Opportunities Score out of a maximum score of 182 indicates the level of opportunities that you have for creating wealth based on stored money energy. The overall objective is to design a plan for boosting your "money energy" battery by creating opportunities in the following two key category areas:

Your Financial Flexibility – you have surplus assets and income, which provide the capability to make life and financial decisions on your terms; and

The Power of Your Human Capital – you have the talents and capabilities to earn income and create wealth based on your being

So, that you can use the feedback summary we have provided based on your responses, please follow these steps.

Step 1. Identification and Prioritization of Low Money Energy Opportunities Scores

- Conduct an initial assessment to identify your current 26 Money Energy Opportunities scores in each of the two categories (there are 13 scores in each of the two categories).
- Rank the 26 Money Energy Opportunities scores, with the lowest scores getting the highest priority.
- Allocate more time and resources to the lowest scores to initiate improvement efforts.
- In allocating more time to the lowest Money Energy Opportunities scores it is important you do not let the highest-scoring areas decline.

Step 2. Setting the Target for Money Energy Opportunities Optimization

- Establish a clear goal for each score, ideally aiming for a score of 7/7.
- Recognize that while the ultimate goal is perfection, progress is more important than perfection.
- Develop specific, achievable objectives for each Money Energy Opportunity to gradually progress towards the target score.

Step 3. Incremental Improvement for Mid-Range Money Energy Opportunities Scores

- Identify Money Energy Opportunities with scores between 4 and 6.
- Analyze these attributes to understand what's working well and where improvements can be made.
- Implement targeted actions to elevate these scores, focusing on continuous, incremental progress.

Step 4. Continuous Assessment and Adjustment

- Establish a regular schedule for reassessing your Money Energy Opportunities scores in each category.
- Use these assessments to gauge progress and identify new areas that may require attention.
- Adapt your strategies based on these assessments, ensuring a flexible approach that responds to changing needs and circumstances.

Step 5. Documentation and Reflection

- Keep a detailed record of actions taken, progress made, and challenges encountered in each category.
- Reflect on these experiences regularly to glean insights and lessons that can inform future strategies.
- Share your progress and reflections with a mentor, coach, or peer group to gain external perspectives and advice.
- Repeat completion of the Money Energy Opportunities Discovery every 6 months.