




Determine Your “Why”

Step 1 in Your Roadmap to
Financial Independence

A vibrant illustration of a grey asphalt road that winds through a lush green field. The road starts from the bottom left and curves towards the top right, disappearing into the distance. The grass is a bright, healthy green, and the overall scene is bright and sunny.

If your financial path is not leading you to accomplish what is most important, you might be on the wrong path

After the creation of hundreds of financial plans, I've discovered that the journey of becoming our best selves can be separated into four key areas:

1. **Service:** Devoting one's time and talents to volunteer work, deriving fulfillment from contributing to the well-being of others.
2. **Experience:** Developing new hobbies and embracing experiences that enrich lives with diverse and fulfilling activities.
3. **Giving:** Using your financial resources to help your family, community, and organizations that you believe in.
4. **Achievement:** The pursuit of personal goals and accomplishments, fostering a continual sense of purpose and achievement in post-career lives.

The collective desire is for more—a desire to serve more, experience more, give more, or achieve more.

Consider the following examples:

- Volunteer in the Community
- Mentor a Peer/Co-worker
- Spend Time with Family/Friends
- Travel
- Donate
- Help Family/Friends
- Improve Health
- Learn a New Skill



The pursuit of wealth is not merely confined to monetary gains but extends to the enhancement of our lives and the lives of those around us. By responsibly navigating the areas of serving, experiencing, giving, and achieving, we can carve a path towards a more purposeful and meaningful life.

Next Steps:


Take out a sheet of paper and divide it into 4 sections with one of these words at the top of each section

Serve	Experience
Give	Achieve

Now, list no more than 5 goals or events that you want to accomplish in any or all 4 areas.

Ask yourself questions like:

- How am I already serving? How can I serve more
- How am I experiencing the world? How would I experience more?
- How am I benefiting others financially? How and where would I give more?
- How am I striving to achieve? How would I achieve more?
- What do I enjoy doing now and want to do more of?
- Do I enjoy the work I do as part of my employment?
- When do I want to be debt-free?
- What organizations or individuals do I want to help?
- When do I want to be financially independent?



Keep these in mind as you
navigate your financial path



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