



Refocus > Gain Control > Set a Plan

FINANCIAL COACHING PATH



PROGRESS SOLUTIONS
FINANCIAL COACHING



Overview

Lay the foundation for self independent money management skills. Instill the habits and behaviors of successful personal finance. Teach the basic money management skills. Tell your money where to go, versus wonder where it went. Cash Flow Management, Communication, Debt Elimination, Saving, Wealth Building, and Protection.

Financial coaching is about helping take the action and modifying behaviors to make smarter financial choices. Coaching is designed to give you accurate and authoritative information in regard to the subject matter covered, it is provided with the understanding the coach will not render specific legal, accounting, tax, real estate, counseling, or other professional advice. Depending on your situation, you may need to seek the services of license professionals.



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I help families with kids build a solid *financial foundation* through budgeting, debt elimination and savings to prepare to build wealth.

LEARN MORE

What is a Financial Coach?

Personal Finance is 80% Behavior and 20% Knowledge

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Issues to solve

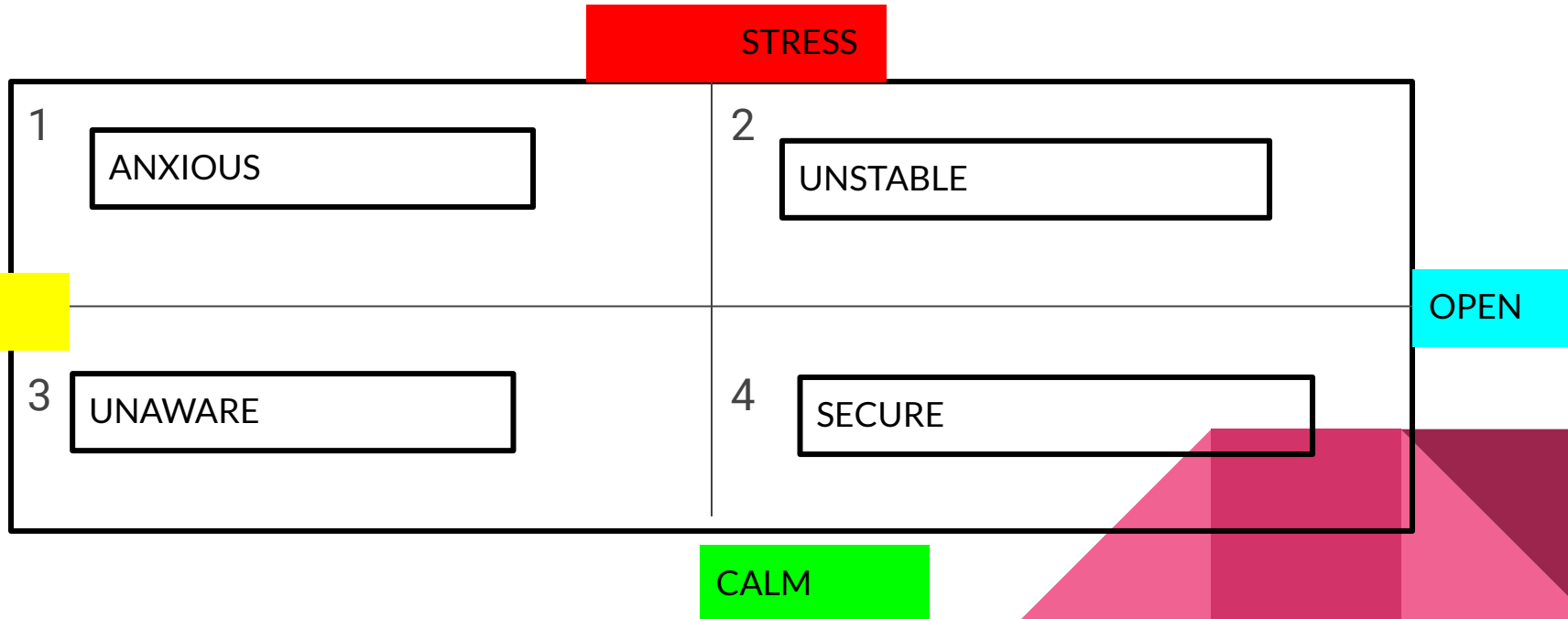
1 ACCOUNTABILITY &
FOLLOW THROUGH

2 FRUSTRATION

3 LACK OF PROCESS

4 COMPLICATION

THE 4 MONEY HOUSEHOLDS





REFOCUS is a reset for what is next...

WHY

MINDSET

PRIORITIES

GOALS

COMMUNICATION

HOLISTIC

Refocus on...

Where to start?

Where are we going?

What is most important ?

NEW LEVEL, NEW CHALLENGE

WHY?

Determine your root want

The deeper you go, the better it develops a passion for winning

INTERNAL / EXTERNAL

Who else is it affecting? How would it feel if?

What is it preventing you from doing or feeling?

What if nothing changes or do anything about it?

PERSONAL WEALTH DEFINITION



RESULTS OF A STRONG WHY

- Positions you to make decisions with wisdom
- Improved communication
- Conflict free calendars that reflect family priorities
- Fewer conflicts
- Follow through
- Priorities that match your goals/objectives
- Excellent opportunity cost decisions

WHAT DOES WEALTH MEAN TO YOU?

Take a Moment and write out what wealth means to you and what does being wealthy mean to you?

- Are they two different definitions and why?
- What other areas of your life need attention to become wealthy?
- What type of relationship do you want to have with money
- 30/60 /90



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IF THERE WAS A CLOSE SECOND TO THE MOST IMPORTANT THING IN YOUR LIFE, WHAT IS IT?



Examples of things that are important to others:

- **Family**
- **Faith & Spirituality**
- **Health**
- **Leisure**
- **Legacy**
- **Career**

What is the Single most important thing to you?



Do you get emotional when you think about your answers?

Are you willing to fight for what you wrote down?

If not, we encourage you to work with your coach to dial this into your situation.

WHAT IS MONEY?

WHERE DOES IT COME FROM?

WHAT CAN I DO WITH IT?

- **STORE OF VALUE, TIME, LABOR, and SKILL**
- **ALLOWANCE VS. COMMISSIONS**
- **SPEND IT, SAVE IT, GIVE IT**



GAIN CONTROL -Tools, Resources and sustainable Wealth building habits

Money Plan

Time management

Behavior modification

Follow through

Money Systems

Communication

Positive habits

Knowledge

WHERE IT ALL STARTS



WHAT IS
a zero-based budget?

THE 7 BABY STEPS



1. Baby Emergency fund \$1,000
2. Eliminate All Debt outside your mortgage
3. Build 3-6 month of expenses cash
4. Save 15% towards retirement
5. Save for College
6. Pay off the Mortgage Early
7. LIVE AND GIVE like no one else

THE DEBT SNOWBALL

Step 1: List your debts from smallest to largest, regardless of interest rate.

Step 2: Make minimum payments on all your debts except the smallest.

Step 3: Pay as much as possible on your smallest debt.

Step 4: Repeat until each debt is paid in full.

Now, before you start arguing about the interest rates, you're going to be jumping up and down when you pay off that smallest debt super quick. That excitement is what's going to motivate you to keep working hard—all the way to that debt-free finish line. **IT'S ALL ABOUT BEHAVIORS!**



SET A PLAN of **ACTION**

Establish Milestones

Celebrate Successes

Debt Elimination

Risk Management

Investing

Prioritization List

Life Events

WHAT IS NEXT?



What DO I NEED TO DO?

REACH OUT FOR HELP - YOU ARE NOT ALONE

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Thank you.



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