

In Her Dreams:

A Visualization Exercise For Her Financial Future

Getting clear on your financial goals is the first step to appreciate your life and your wealth. No dream is too big here. No starting place is too small. The only thing required for this journey is honesty.

As you navigate these questions, take note of what excites you and what makes you hesitate. Pay close attention to your thoughts and emotions. You may discover what you really want to experience and the feelings you seek from your financial future.

If you were given \$1M today, what would you do with it? Why?

How would you describe your current financial health as it is today?

List 3-5 things you feel when you think about your current financial health. Now, what do you want to feel when you think about finances in the future?

Write down characteristics of the lifestyle you envision for your future.

What are three of the most important things you'd like to do or accomplish in life, assuming you're financially able to do so in the future?

Complete the following sentences with the first word(s) that comes to mind. Don't overthink it. There's no censoring or editing needed. Jot down the first thing that you think of and you're on your way to unlocking the financial future that aligns with your personal story.

Money is...
Success means...
The best financial advice I've ever heard was...
When it comes to money, my friends are...
To me, living in comfort means...
When I hear the word, "saving," I think...
Being financially independent means....
Investing is...
The worst financial advice I've ever heard was...
The best money I ever spent was...
I'll know I made it if...
Retirement is...

Now, stop.

Close your eyes and picture the financial future you want to create. At first, you may see an assortment of images like a never-ending Pinterest feed, and that's OK. Narrow your focus to the images that make you feel the way you want about the future. What do you see? Get specific about where you are, what you're doing, the people and things around you, etc.

Finally, open your eyes and write down the financial future you'll bring to life.
