

# the TABLE

## SHOW NOTES

### 10 Must-Do's Before The End of 2023

#### 1. Reflect on Your Financial Wins and Missteps

- **List Financial Wins:** Catalog all your monetary victories.
  - *Why:* Celebrating wins reinforces positive behavior.
- **Room for Improvement:** Identify areas where you could have done better.
  - *Why:* Acknowledging mistakes provides learning opportunities.

#### 2. Review Your Last Three Months of Bank Statements

- **Examine Expenses:** Closely analyze your spending habits.
  - *Why:* Awareness of your expenses helps you budget better.
- **Subscriptions:** Identify and cancel forgotten subscriptions.
  - *Why:* Forgotten subscriptions drain resources.
- **New Debit Card:** Consider whether you need to renew your card.
  - *Why:* A fresh card can offer better security features.

#### 3. Calculate or Update Your Net Worth Status

- **Definition of Wealth:** Wealth is the sum of all valuable assets you own, minus your total debts.
  - *Why:* Understanding wealth gives you a financial baseline.



*Unlock the Secrets to Wealth Building: Scan this QR Code Now! Get access to an exclusive tool that not only tracks your financial growth but also offers tailored advice on where and how to invest.*

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### 4. Assess Your Debt Situation

- **Credit Report:** Obtain a copy from [annualcreditreport.com](https://annualcreditreport.com).
  - *Why:* Knowing your credit standing helps you strategize.

### 5. Maximize ALL of Your Retirement Accounts

- **401(k):** Contribute up to \$22,500 and maximize company matches.
  - *Why:* Maximizing contributions amplifies compound growth.
- **IRA:** Contribute \$6,500 or \$7,500 if you're over 50.
  - *Why:* IRAs offer tax advantages for retirement savings.
- **HSA:** Up to \$7,300; company matching may be available.
  - *Why:* HSAs offer triple tax advantages for healthcare expenses.

### 6. Update or Create Your Estate Plan

- **Estate Plan Includes:**
  - *Why:* Having a plan in place gives peace of mind and ensures legacy continuity.



**Unlock Financial Peace of Mind: Scan this QR Code for a Free Life Insurance Quote!**  
**With Ethos, you don't just get coverage—you also receive a FREE Estate Plan to secure your legacy. Act now!**

### 7. Review All Insurance Policies

- **Best Rates:** Ensure you're getting the most competitive rates.
  - *Why:* Reducing costs maximizes your financial resources.
- **Adequate Coverage:** Verify you have sufficient protection.
  - *Why:* Inadequate coverage can lead to devastating financial losses.

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### 8. Outline a Clear Vision for 2024

- **Family Goals:**
  - *Why:* Shared goals improve family unity.
- **Financial Goals:**
  - *Why:* Financial planning is essential for future security.
- **Career Aspirations:**
  - *Why:* Career progression impacts your earning potential.
- **Personal Objectives:**
  - *Why:* Personal growth is essential for holistic wellbeing.

### 9. Evaluate Your Inner Circle

- *Why:* The company you keep influences your financial choices and overall success.

### 10. Envision and Pray for Your 2024

- **Pray that you BUILD Your Table and create a prosperous 2024.**
  - *Why:* Spiritual grounding provides strength and perspective.

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#### **FREE RESOURCES**

*Elevate Your Life in Every Aspect: Whether you're looking to amplify your finances, nurture meaningful relationships, or live a life filled with intention and grace, discover the ultimate tools to help you achieve all this and more! Don't wait—transform your life today!*

