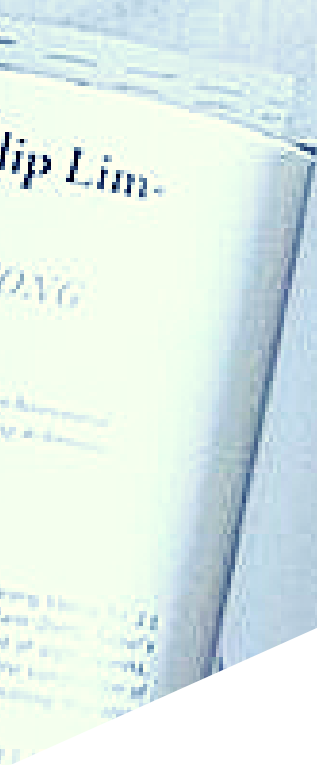


*excuse me
while I
build an empire*



My Bossbabe

FINANCE PLANNER

FOR

The little details

DISCLAIMER

YOU USE THIS PLANNER 100%, ABSOLUTELY, ALTOGETHER, COMPLETELY, COMPREHENSIVELY, ENTIRELY, EXHAUSTIVELY, FULLY, THOROUGHLY, TOTALLY, UNCONDITIONALLY, WHOLLY AND WITHOUT OMISSION AT YOUR OWN RISK. YOU ARE RESPONSIBLE FOR YOUR OWN PERSONAL FINANCES AND SHOULD NOT RELY ON THIS PLANNER OR ANYONE ELSE TO MAKE THE FINAL DECISION FOR YOU. THIS PLANNER IS MERELY A DEVICE THAT CAN HELP YOU TO THINK AND CONSIDER, BUT YOU ARE 100% RESPONSIBLE FOR ANY ACTIONS YOU TAKE BY USING THIS PLANNER.

THE INFORMATION CONTAINED WITHIN THIS PLANNER FROM ALL WRITERS IS PROVIDED FOR INFORMATIONAL PURPOSES ONLY AND IS NOT INTENDED TO SUBSTITUTE FOR OBTAINING PROFESSIONAL FINANCIAL ADVICE. PLEASE THOROUGHLY RESEARCH EVERYTHING YOU READ HERE AND SEEK PROFESSIONAL REPRESENTATION BEFORE ACTING ON ANY INFORMATION YOU MAY HAVE FOUND IN THIS PLANNER AND JUST IN CASE NONE OF THE ABOVE IS CLEAR:

IT IS THE BELIEF AT THE FINANCIAL DIVA THAT YOU ARE THE PRINCIPLE PERSON RESPONSIBLE FOR YOUR PERSONAL FINANCES. ALTHOUGH WE TRY TO BRING ACCURATE INFORMATION, UNDER NO CIRCUMSTANCES CAN OR DO THE FINANCIAL DIVA OWNERS, CONTRIBUTORS, AUTHORS AND PARTNERS WARRANT THE COMPLETENESS OR ACCURACY OF THE CONTENT FOUND IN THIS PLANNER OR ITS USEFULNESS FOR ANY PARTICULAR PURPOSE. THEREFORE, THE FINANCIAL DIVA OWNERS, CONTRIBUTORS, AUTHORS AND PARTNERS MAKE ABSOLUTELY NO PROMISES OR WARRANTIES, NOR ACCEPT RESPONSIBILITY FOR ANY LIABILITY, INJURY OR DAMAGE THAT YOU MAY CAUSE OR INCUR WHEN USING THE INFORMATION PROVIDED IN THIS PLANNER. WE ALSO CAN'T AND DON'T MAKE ANY PROMISES THAT OUR CONTENT OR SERVICE WILL BE DELIVERED TO YOU UNINTERRUPTED, TIMELY, SECURE, OR ERROR-FREE.

ALL INFORMATION AND CONTENT PROVIDED ON THE FINANCIAL DIVA IS TO BE USED ON AN "AS IS" BASIS. WE ENCOURAGE YOU TO RESEARCH ALL INFORMATION PROVIDED ON THIS SITE THOROUGHLY WITH OTHER ADVICE OUT ON THE WEB AND FROM OTHER SOURCES AND WEIGH IT TO YOUR PARTICULAR CIRCUMSTANCES TO BE APPLIED ACCORDINGLY. NONE OF THE INFORMATION PROVIDED IN THE FINANCIAL DIVA IS MEANT TO BE USED IN REPLACEMENT OF PROFESSIONAL ADVICE AND THE USERS ARE ENCOURAGED TO SEEK SUCH ADVICE BEFORE MAKING ANY DECISION. IT IS SOLELY UP TO THE USER TO DETERMINE IF ADVICE IS SAFE AND SUITABLE FOR THEIR PARTICULAR SITUATION.

Making the most

OF YOUR PLANNER

WHEN I LOOK BACK, I KNOW THAT IT WAS STAYING ORGANIZED AND MAKING REALLY SMART FINANCIAL DECISIONS THAT GOT ME TO WHERE I AM TODAY, LIVING MY DREAM LIFE. BUT, I KNOW HOW STRESSFUL THIS TIME CAN BE FOR YOU PLANNING YOUR FINANCES. ALL OF THE SUDDEN YOU MAY HAVE A MAJOR FINANCIAL EXPENSE TO PLAN FOR AND PAY FOR, PLUS THERE'S JUST LIFE TO PAY FOR AS WELL.

IT'S SAID THAT FINANCIAL STRESS IS THE TOP STRESS FACTORS, AND I'D SAY THAT'S COMPLETELY TRUE. IT'S MY HOPE THAT THIS PLANNER CAN PROVIDE SOME PEACE OF MIND FOR YOU AND HOPEFULLY MAKE THIS PART OF YOUR LIFE A LITTLE LESS STRESSFUL.

THAT BEING SAID, SOME OF THESE CONVERSATIONS ARE GOING TO BE REALLY TOUGH TO HAVE + DECIDE ON. IF YOU'RE FINDING IT UNCOMFORTABLE TO GET THROUGH, OR YOU'D JUST LIKE TO MAKE SURE YOU'RE ON THE RIGHT TRACK, I'D LOVE TO PERSONALLY GO THROUGH THIS WITH YOU.. WE CAN CHAT ABOUT IT OVER EMAIL TO START, AND GET YOU ON TRACK.

I'D LOVE THE OPPORTUNITY TO BE YOUR FINANCIAL COACH, IT'S SOMETHING I AM REALLY PASSIONATE ABOUT, AND SOMETHING I OFFER FREE OF SERVICE TO ALL OF MY CLIENTS. IF YOU'RE CURIOUS ABOUT HOW I CAN HELP YOU OUT, PLEASE SEND ME AN EMAIL AT ANYTIME. LET ME TAKE CARE OF PLANNING YOUR FINANCES, AND YOU CAN WORRY ABOUT THE FUN STUFF IN LIFE.

ALWAYS HERE TO HELP,
RISA

The Financial

Diva

www.thefinancialdiva.ca

risa@thefinancialdiva.ca

INSPIRATIONS

AND DREAMS

DON'T STOP
GET IT
GET IT



Vision board this page up
build the life of your dreams here

Personal Financial Future

CHECKLIST

I COULD REALLY GO FOR A
MILLION DOLLARS AND A
TRIP TO THE BAHAMAS
RIGHT NOW 

- | | |
|--|--|
| <input type="checkbox"/> DO I HAVE THE RIGHT AMOUNT OF CHEQUING AND SAVINGS ACCOUNTS? | <input type="checkbox"/> HAVE I MADE RETIREMENT SAVINGS GOALS ? |
| <input type="checkbox"/> HAVE I DECIDED ON MY HOME OWNERSHIP GOALS? | <input type="checkbox"/> DO I HOW MUCH WE NEED TO BE SAVING EACH MONTH? |
| <input type="checkbox"/> HAVE I MADE A PLAN TO REPAY MY DEBT? | <input type="checkbox"/> DO I HAVE HOME OWNERS INSURANCE? |
| <input type="checkbox"/> DO I UNDERSTAND MY MORTGAGE AND HOW TO PAY IT OFF QUICKER? | <input type="checkbox"/> DO I HAVE A FUN SAVINGS ACCOUNT SET UP? |
| <input type="checkbox"/> DO I HAVE AN EMERGENCY FUND WITH 6 MTHS OF LIVING EXPENSES? | <input type="checkbox"/> I SET UP MY ANNUAL FINANCIAL REVIEW WITH OUR FINANCE COACH? |
| <input type="checkbox"/> DO I HAVE LIFE INSURANCE POLICIES? | <input type="checkbox"/> IS MY CURRENT FINANCE COACH PROVIDING ME REGULAR UPDATES ON MY FINANCIAL GOALS? |
| <input type="checkbox"/> DO I HAVE EXTRA DISABILITY INSURANCE POLICIES SEPARATE FROM MY WORK ONES? | |
| <input type="checkbox"/> DO I HAVE AN INCOME CUSHION IN MY BANK ACCOUNTS? | |
| <input type="checkbox"/> HAVE I REVIEWED MY CAR INSURANCE RECENTLY? | |
| <input type="checkbox"/> DO I HAVE RETIREMENT SAVINGS ACCOUNTS? | |

Business Financial Future

CHECKLIST

BRAVE GIRL, YOU WERE
MADE TO DO AMAZING
THINGS



- | | |
|--|---|
| <input type="checkbox"/> DO I HAVE SEPARATE BIZ + PERSONAL BANK ACCOUNTS? | <input type="checkbox"/> DO I HAVE EMPLOYEE PAY TO ORGANIZE? |
| <input type="checkbox"/> DO I HAVE A SEPARATE BIZ CREDIT CARD? | <input type="checkbox"/> DO I HAVE OUTSTANDING INVOICES FROM CLIENTS? |
| <input type="checkbox"/> DO I HAVE MY NEXT 12 MONTHS OF EXPENSES AND INCOME PROJECTED? | <input type="checkbox"/> DO I HAVE OUTSTANDING BILLS TO PAY? |
| <input type="checkbox"/> DO I HAVE ALL THE PROPER INSURANCES IN PLACE? | <input type="checkbox"/> DO I HAVE A BIZ FINANCIAL COACH? |
| <input type="checkbox"/> DO I HAVE A REGULAR PAY CHEQUE SET UP FOR MYSELF? | <input type="checkbox"/> DO I RECEIVE REGULAR UPDATES ON MY BIZ FINANCES? |
| <input type="checkbox"/> DO I HAVE MY RECEIPTS ORGANIZED? | <input type="checkbox"/> DO I HAVE A BIZ SAVINGS ACCOUNT? |
| <input type="checkbox"/> HAVE I SOUGHT OUT TAX SAVINGS ADVICE? | <input type="checkbox"/> HAVE I MADE MY 5 YEAR BUSINESS GOALS? |
| <input type="checkbox"/> DO I SAVE THE PROPER AMOUNT FOR TAXES EVERY MONTH? | <input type="checkbox"/> DO I TRACK MY MILEAGE PROPERLY? |
| <input type="checkbox"/> DO I HAVE A BIZ BUDGET? | <input type="checkbox"/> DO I KNOW MY MINIMUM MONTHLY SALARY? |
| <input type="checkbox"/> DO I HAVE A PERSONAL BUDGET? | |

All of my details

COFFEE IN ONE HAND
CONFIDENCE IN THE
OTHER

MY HOUSEHOLD
FINANCES 

INCOME:

SAVINGS:

EXPENSES:

RENT/MORTGAGE
HYDRO
UTILITIES
PROPERTY TAX
TV/CABLE
INTERNET
CELL PHONE
CAR PYMT
CAR INSURANCE
GYM MEMBERSHIP
GAS
GROCERIES
ENTERTAINMENT
MISC.
LIFE INSURANCE
DISABILITY INSURANCE

LEFT OVER AT END
OF MONTH:

All you need is a dream

TO INVEST IN YOURSELF
IS THE BEST INVESTMENT
OF ALL

MY STARTING
POINT 

DEBT TOTALS

SAVINGS TOTALS

INSURANCE PRODUCTS

Goal Digger

TODAY'S AGENDA:
BUILDING MY EMPIRE

MY 5 YEAR
GOALS 

family

finances

travel

adventure

home

career

Cheers to the good life

YOU GOT THIS, GIRLBOSS

STAYING FOCUSED
ON WHAT'S
REALLY IMPORTANT
DURING THIS
PLANNING 

30 THINGS I'M
GRATEFUL FOR

- | | |
|----|----|
| 1 | 16 |
| 2 | 17 |
| 3 | 18 |
| 4 | 19 |
| 5 | 20 |
| 6 | 21 |
| 7 | 22 |
| 8 | 23 |
| 9 | 24 |
| 10 | 25 |
| 11 | 26 |
| 12 | 27 |
| 13 | 28 |
| 14 | 29 |
| 15 | 30 |