



The first step to gaining financial control and motivation is knowing what you want to achieve financially. And the bonus? With financial purpose comes financial motivation!

Defining Wealth

In order to create something, we first need to be able to define it. At Verve, we believe the true meaning of wealth is an abundance of what you value most in your life. With that in mind, what brings you the most comfort and joy? What makes your heart sing?

The first step towards managing your money well, is to be clear on what you value in your life. Your values determine your goals and your goals determine how much money you need to earn, save and invest to support your dream for a wealthy life.

What does WEALTH mean to you?



Now with your idea of wealth front of mind, what jumps out as your top financial priority at the moment? Maybe you have two or three?

Take some time to reflect on your top financial priorities.

Identifying your priorities

There are countless directions we can turn in and any multitude of adventures we can fill our lives with. Describe (or draw!) your top three financial priorities for your year ahead. These may be inspired by the wealth brainstorm above, or be the financial priorities you want to focus on to help bring to life your personal goals you set in Lesson 1.

1.

2.

3.

Even better, break one of your financial goals down. What resources do you currently have to support them and what resources do you need to accumulate?

Financial Priority

Reason it's important to me

Money required to achieve goal

Money already put aside for goal

Additional \$\$'s required

First step I need to take

Possible obstacles

Mindset shift or action to overcome obstacles

Complete by:

On a scale of 1-10, how excited are you about achieving this goal? How will you be feeling the day you achieve your goal? Sit in that excitement and let the motivation drive your day to day financial choices and decision making.