



Kick^{the Fear} out of your FinancesTM

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Worksheet

No Fear Finances Live Launch

November 9th - 13th @ 11a PST

Where YOU Kick the Fear Out of your Finances for good!

Worksheet

This worksheet will be your notes, your planner and your map to cultivating your financial literacy and foundation to achieving your financial goals.

Follow along with us LIVE each day to complete this worksheet!

Session 1:

July 6th at 11am PST

THE 5 P'S TO FINANCIAL PROSPERITY

Principle 1: _____

Principle 2: _____

Principle 3: _____

Principle 4: _____

Principle 5: _____

You will notice that I deal with _____, not _____, or _____.

When you implement a _____ in your life, it will create _____
AND be _____. _____ and _____ are meant to be _____
and _____ come and go to meet the _____ of the moment.
_____ will never _____ you or _____ down.

It is never too _____ or too _____ to begin living these _____.

I'm thrilled you made the choice to start today!

Principle #1

The _____ of Money

Why is money a _____ subject?

FACTS:

- _____
- _____

EARN

TAX

SPEND

SAVE



FICTIONS:

- _____
- _____
- _____

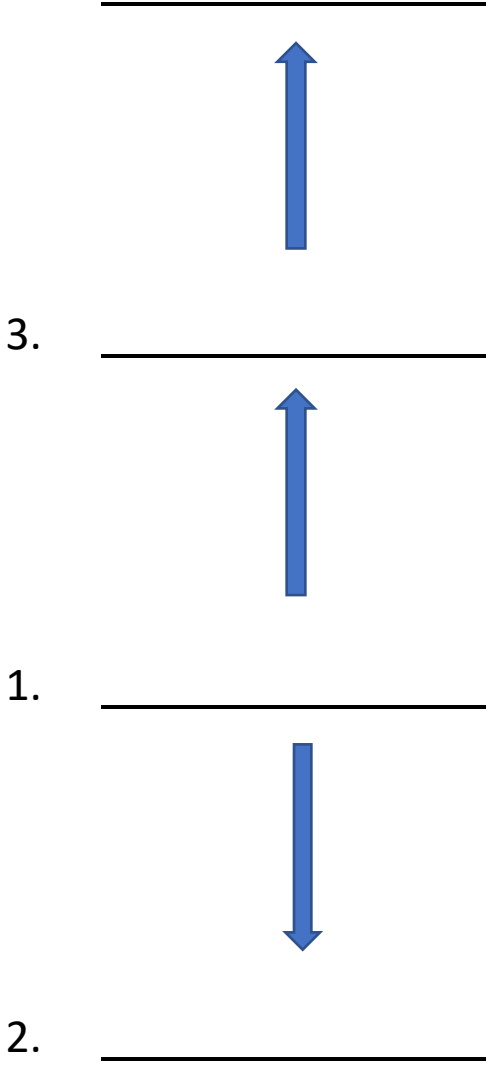
Conscious mind vs. Subconscious mind

_____ of all our decisions are already made for us through our _____ or our _____ systems.

How we make changes:

- _____
- _____
- _____

PEOPLE WANT:



HOMEWORK: Write down three beliefs you were told as a child about money that may be in your subconscious mind right now. You do not have to confess that your conscious mind holds that belief today.

Session 2: July 7th at 11am PST

LET'S MAKE CHANGE

1. _____
2. _____
3. _____

Belief

Impact

1. _____
2. _____
3. _____

Homework Exercise: _____

VALUES:

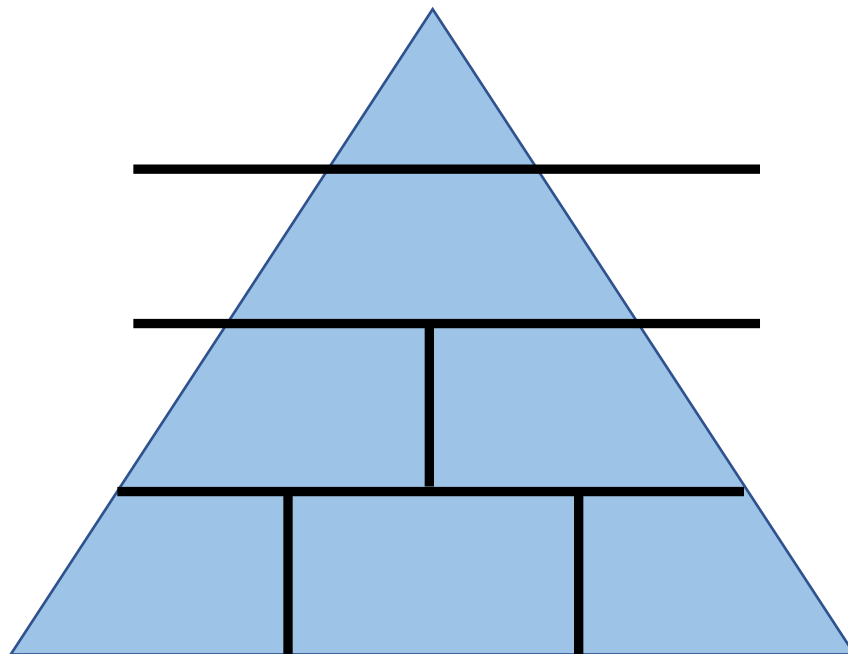
Your Value System is the _____ to _____
_____ your _____.

The process of understanding _____
Is absolutely essential.

VALUES PYRAMID

Let's define our values:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____



Examples of Values:






Examples of Goals:

Session 3: July 8th at 11am PST

Principle #2

_____ *Before* _____

...taking the vacation of a lifetime.

1. _____ 
2. _____ 
3. _____ 
4. _____ 
5. _____ 

Gaining Clarity

Financial Fitness Quiz

- | | | | | |
|----------|----------|-----------|-----------|-----------|
| 1. _____ | 5. _____ | 9. _____ | 13. _____ | 17. _____ |
| 2. _____ | 6. _____ | 10. _____ | 14. _____ | |
| 3. _____ | 7. _____ | 11. _____ | 15. _____ | |
| 4. _____ | 8. _____ | 12. _____ | 16. _____ | |

Scoring: _____

- _____
- _____
- _____

THE PROCESS

Step 1: It's time to _____ your finances.

- _____
- _____

▪ **CREATE A** _____

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

You may discover you have a few _____.

1. _____
2. _____
3. _____

Commit yourself to _____.

Step 2:

WHERE ARE YOU NOW?

Homework: _____

Are you living Rich or Just Expensively?

Homework: _____

1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Session 4: July 9th at 11am PST

STEP 3: WHERE DO YOU WANT TO GO?

Designing a _____ with a _____.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____

Principle #3

Plan of _____

FILLING YOUR TREASURE CHESTS

1. _____
2. _____
3. _____

I. _____

4 WAYS _____

1. _____

2. _____

3. _____

OR

4. _____

3 IMPORTANT FACTS OF LIFE

1. _____

2. _____

3. _____

The time to _____ to _____ - to _____
_____ - is _____ !

II. _____

*This is your _____, your _____,
your _____ and _____ against the _____.*

Let's look at what this entails:

- _____
- _____
- _____
- _____
- _____

Consider the following statistics:

- _____
- _____
- _____

But,

- _____
- _____

III. _____

FILLING YOUR _____

FUNDING...

- **Short-Term**

- _____
- _____
- _____
- _____

- **Mid -Term**

- _____
- _____
- _____
- _____

- **Long – Term**

- _____
- _____
- _____
- _____

- **Longer – Term**

- _____
- _____
- _____

ASKING FOR HELP!

About Jamie L. Fleming

I'm the author of Kick the Fear out of your Finances™ and a public speaker on the topic. I created this course in 2006 to give individuals and business owners the foundational knowledge necessary to create and sustain financial success while honoring their Value System.

With over 30 years of experience in the financial industry, I've assisted 1,000's of clients in achieving their financial goals.

Business Owner/Entrepreneur:

Established Fleming & Associates, LLC in 2003. The firm is a full-service financial planning and asset management firm as well as insurance services and wealth protection.

Certified Financial Planner/Financial Advisor:

Jamie has helped clients get to the next financial level and beyond for over 20 years by tackling not only the strategies to reach their goals, but any psychology keeping them from attaining their goals.

Jamie is among an elite group of planners who have met the rigorous requirements necessary to call themselves CERTIFIED FINANCIAL PLANNER™ professionals.

Expert Witness:

Jamie has testified in court as an expert witness to help juries understand complicated financial issues.

Author:

Kick the Fear out of your Finances™ Home study course and year-long programs provide a step by step interactive roadmap to help individuals and couples work through the psychology that keeps them from living the ultimate lifestyle they want to lead.

Public Speaker:

Kick the Fear out of your Finances Women Building Wealth Bank On Yourself Money and Kids IRA Mastery College Funding Workshop 5 Steps for Building Wealth Automatically

Volunteer:

Junior Achievement teaches about concepts relating to entrepreneurship, financial literacy and global workforce readiness. The volunteers bring real-life business experience and guidance into the classroom at a time that represents an essential crossroads for young people.

Athlete:

Pedal for the Cure: 3200 mile bike ride from San Diego, CA to Jacksonville, FL, 1999
Half Marathons: Carlsbad Half (2008), La Jolla Half (2008), Women's Half San Diego (2013)
Marathon: San Diego Rock & Roll Marathon (2008)
Triathlons: Several Sprint Triathlons (1993 – 1998), Training for Olympic Ironman distances (2013-)

Inventor: Feng Shui Hide A Screen (Patent: 20080236015)

Mother of Beautiful Twins, Kinley and Isabella born in 2009

EDUCATION:

Universidad de Granada: 87-89

Spanish Language and Literature

San Diego State University: BA, 1991

Spanish and Finance

Certified Financial Planner Designation, 2002

Series 65: Uniform Investment Advisor Law Exam

Certified Retirement Financial Advisor, 2004

Life and Annuity Professional, 2017

All designations required regular continuing education as well as being registered with the State of California as a Registered Investment Advisory Firm.