

# Who We Help

People that fall within these categories and classes.

Income: \$75,000 - \$150,000

Interest: Travel; Spa; Shopping, Mental peace, Financial Security

Relationships: Mom, single, Center of families needs

Fitness: Needs Attention

Sleep: Needs Attention

Business: Interested in starting or Growing a business (Business Minded)

Spiritual: Believes in Prayer; Want to know more about Vibrations / Chakra's / Meditation

Nutrition: Needs Consistency

Ethics: Above Reproach

Work: Works 9-5 , Hard worker, Too hard

Money: Great earner, Okay saver, retirement is a concern, Student Loans,  
5-10 Credit card debt

## **GOALS**

Financial Security

Trustworthy Partner

Lots of Travel

(Home Ownership)

## **OBSTACLES**

Little Support

Limited Time

Consistency

Uncertainty

Our Clients are willing to invest in him/herself and her company to achieve his/her goals.

<u>GOALS</u>	<u>DESIRES, FEARS and CONCERNS</u>
Financial Security	Afraid that there isn't enough. Older now but not on pace for retirement Credit card debts and Primary Bread winner Pay Off house / Don't want housing to be up in the air Tired of Living on a tight budget barely getting by Feels safe when the bills are paid Doesn't want to worry anymore Loves knowing that her kids are well taken care of
Trustworthy Partner	Money has always been iffy Partner is dependent on them Main family resource and income earner Is demeaned and dumped on for being successful Looked upon as the problem not a helpful partner Self improvement is an assault on the partners life position
Travel	Has traveled to the basic life spots Wants to see more of the world Partner talks about travel but never has the funds Needs a break from the harshness of daily life Looking for experiences

## OBSTACLES

## SOLUTIONS

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Little Support

Access Derick and a diverse community of like minded expert achievers.

Limited Time

Clearly understand what things move the needle and what is non-essential. Learn to effectively set priorities, your intentions, and manage your day.

Help you establish Morning and evening routines.

How to use a daily planner and stick to it.

Consistency

Teach you the easiest way to say no

Build a daily plan that builds on the day before

How to systematically build a sacred financial war chest

Uncertainty

Learning the power of meditation and sleep

Keys to feeling grounded

Maximize TALENTS AND SKILLS

How to get others on board of your plan