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Building Bonds to Establish Financial Stability

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Building Bonds to Establish Financial Stability

Jose Campos & Filip Lorinc



Overarching Goals

- Instill with:
- Financial Stability
- Know-how
- Confidence
- Guarantee their own economic well-being

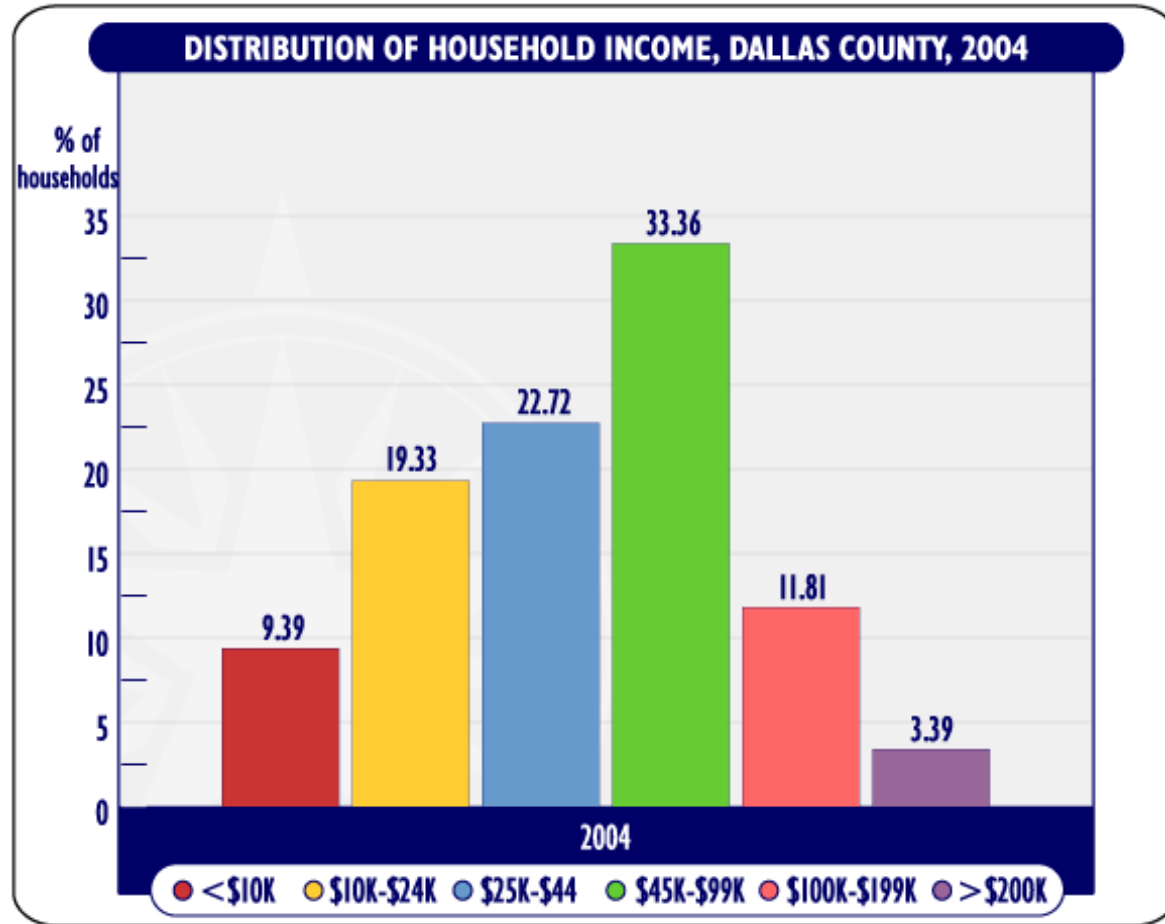
Tools = Stability

- ✧ Discipline/Austerity
- ✧ Budget Planning
- ✧ Common Sense
- ✧ Mentoring/Support Group



Target Clients

- ✧ Lower Income/Middle Class
- ✧ Cyclicity
- ✧ “Rat Race”
- ✧ “9 to 5 until you’re 65”
- ✧ Children’s Experience



Proxy Credibility

- Community Leader, Spokesperson, Organization
- Trust/Close Relationship
- Transcending Barriers
- Building Bonds

What We Are Not

- Micro-Finance Organization
- Supplement Family's Income
- Take-over Finances
- Job Opportunities
- Personal Good Distributions

Process

- Current Financial Situation
- Set Up Personal Plan
- Realistic
- Garner Change and Credibility
- Time Frame
- Habitual Process
- Distancing
- Ensured Success

Recommended Readings

- “The Total Money Makeover: A Proven Plan for Financial Fitness” by: Dave Ramsey
- “Rich Dad Poor Dad: What the Rich Teach Their Kids About Money-That the Poor and the Middle Class Do Not!” by: Robert T. Kiyosaki & Sharon L. Lechter
- “The Automatic Millionaire: A Powerful One-Step Plan to Live and Finish Rich” by: David Bach