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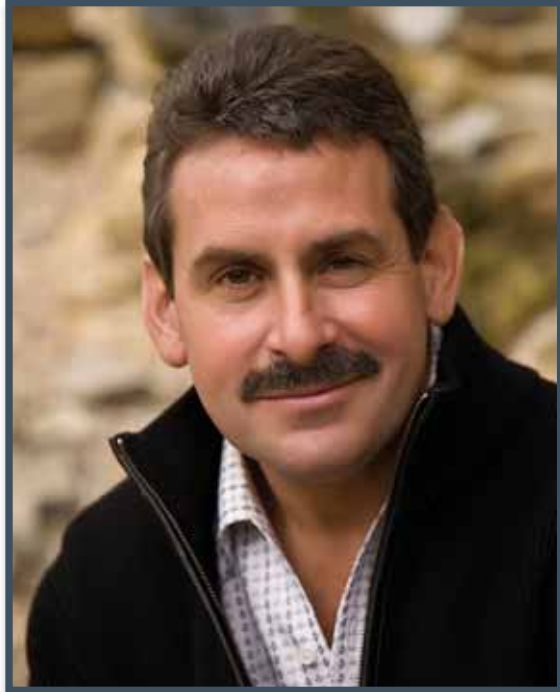
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Mitch Anthony

Show Clients what they're Spending
WITHOUT a Cash-flow Analysis

FINANCIAL ADVISOR MAGAZINE WEBINAR

Problems to Solve

- Comparative Returns are not helpful
- Redundant Dialogues don't grow relationships
- Progress needs to be PERSONALIZED
- The majority of clients don't really know what they're spending and are resistant or lethargic about finding out.
- Traditional Advice Value Propositions are eroding

The Death of Comparison

Relative

Investment

Performance



Advice Roadblocks

Redundancy of Dialogue



ERODING VALUE PROPOSITIONS

- ASSET ALLOCATION—REBALANCING
00-20 BPS
- BIG PICTURE FINANCIAL PLAN
27 BPS
- ROI ADVICE
??

Perspectives



ROL PERSPECTIVES

To be effective, Progress must be personalized



Personal Benchmark is Required for Progress

ROL PERSPECTIVES -----> Change the Central QUESTION

- The QUESTION that has guided this industry for decades has been;
 - “Do you have enough money?”
- The QUESTION we should be asking is;
 - “Are you managing your money in a way that improves your life?”

ROL PERSPECTIVES

It is better to PREPARE than to REPAIR



Why am I here today?

- To help you make FINANCIAL PROGRESS
- To coach on WISE \$ decision-making
- To help you align YOUR VALUES and MONEY



The Four Things you can do with your money

Owe= Debt and Taxes

Grow= Savings and Investment

Live= Spending

Give= Charity

OWE/TAXES

I am content with the amount and process for paying my taxes.

\$16,000

OWE/DEBT

I am content with the amount, purpose, and repayment plan for my current debt.

\$12,000

GROW/SAVINGS

I am content that my savings plan allows me to accomplish what's more important to me.

\$5,000

GIVE/CHARITY

I am content that the proportion of my income & assets allocated giving appropriately reflects the difference I desire to make in the world.

\$2,000

LIVE/SPENDING

I am content that my lifestyle spending aligns with my values and goals.

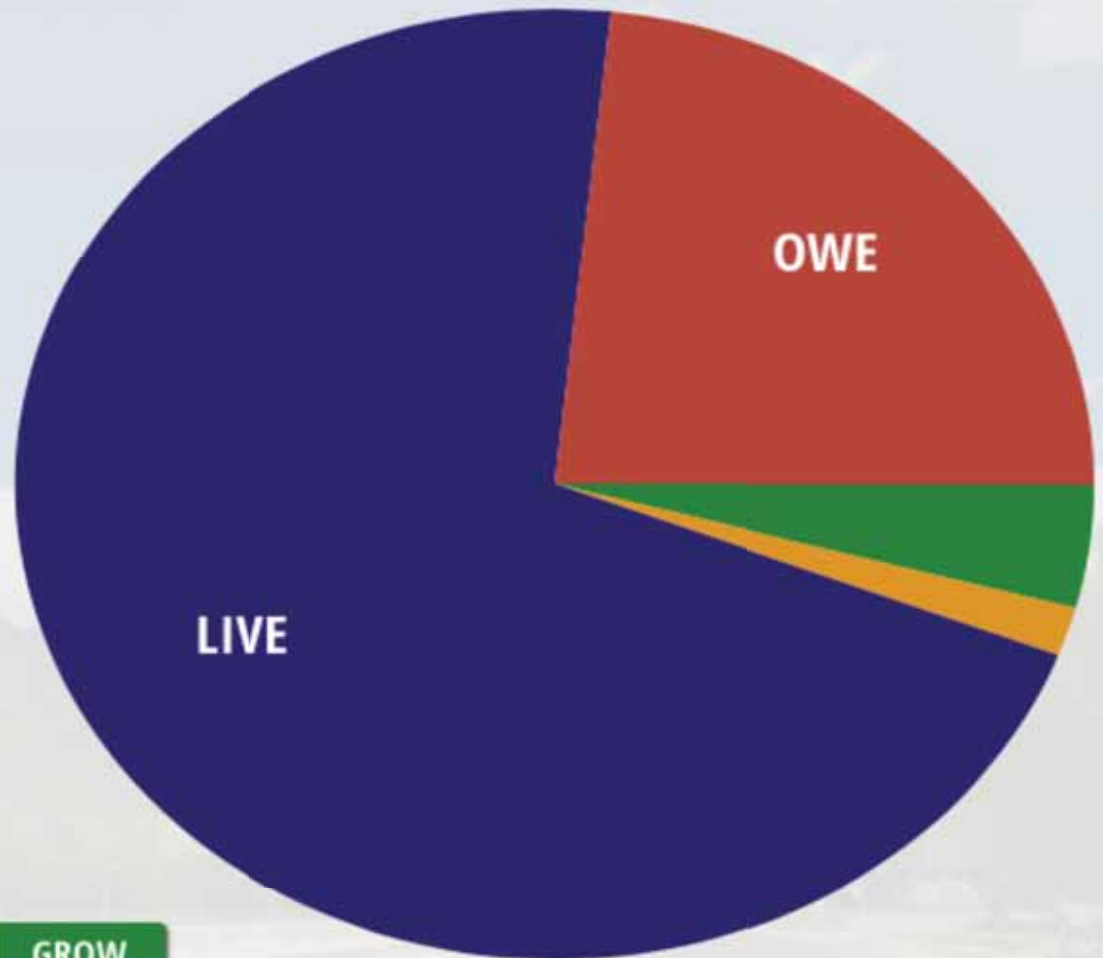
\$85,000

Please enter your yearly income

\$120,000

[Where I am now ...](#) | [Where I want to be ...](#)

Please enter the dollar values into the TAXES, DEBT, SAVINGS, GIVING and LIFESTYLE boxes on the left, indicating **where you are now** ...



GROW

GIVE

REFRESH CHART

OWE/TAXES

I am content with the amount and process for paying my taxes.

\$17,000

OWE/DEBT

I am content with the amount, purpose, and repayment plan for my current debt.

\$9,000

GROW/SAVINGS

I am content that my savings plan allows me to accomplish what's more important to me.

\$12,000

GIVE/CHARITY

I am content that the proportion of my income & assets allocated giving appropriately reflects the difference I desire to make in the world.

\$14,000

LIVE/SPENDING

I am content that my lifestyle spending aligns with my values and goals.

\$88,000

Please enter your yearly income

\$140,000

[Where I am now...](#)

| [Where I want to be ...](#)

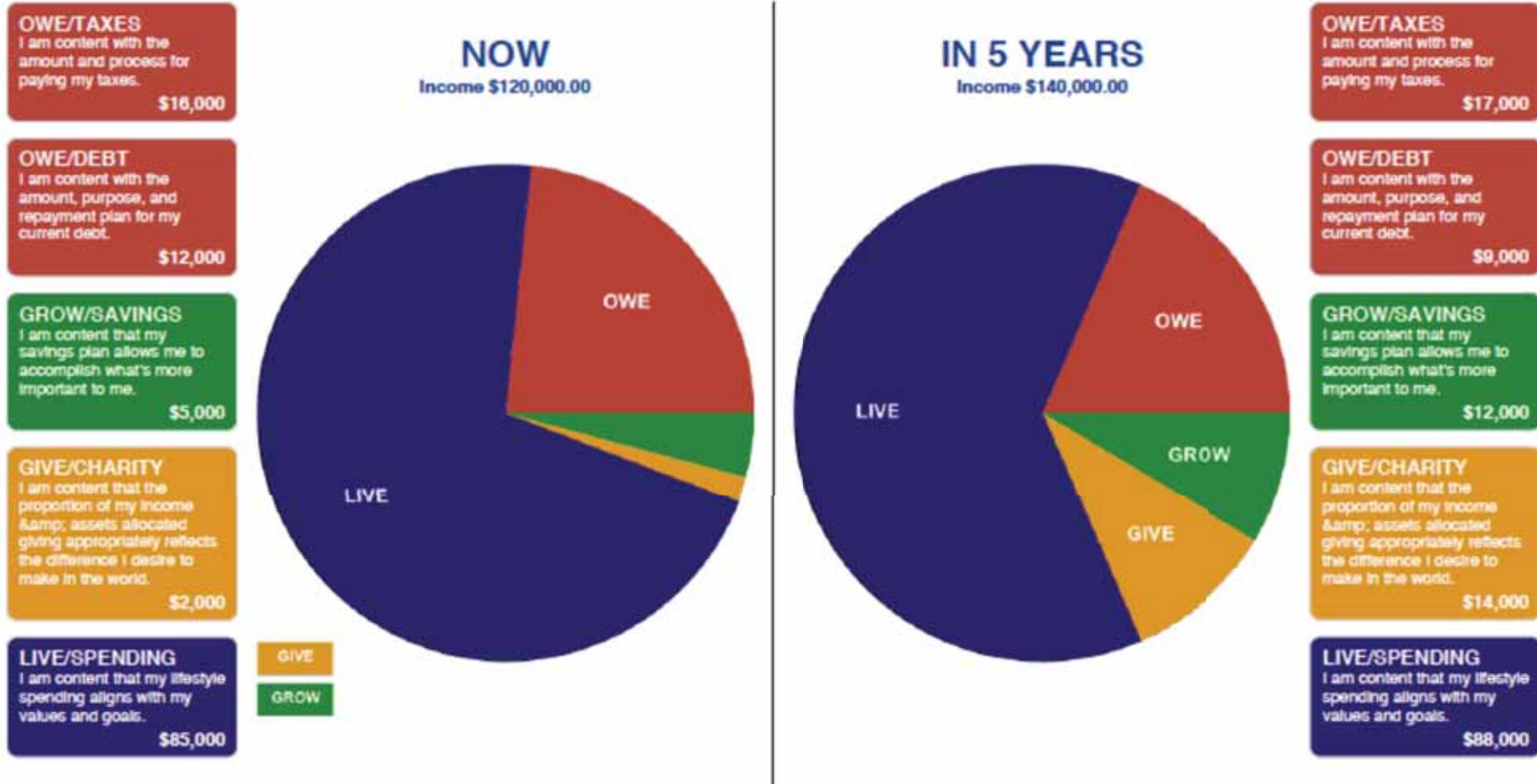
Please enter the dollar values into the TAXES, DEBT, SAVINGS, GIVING and LIFESTYLE boxes on the left, indicating **where you want to be**. Enter the **number of years** below.

My goal in years ...



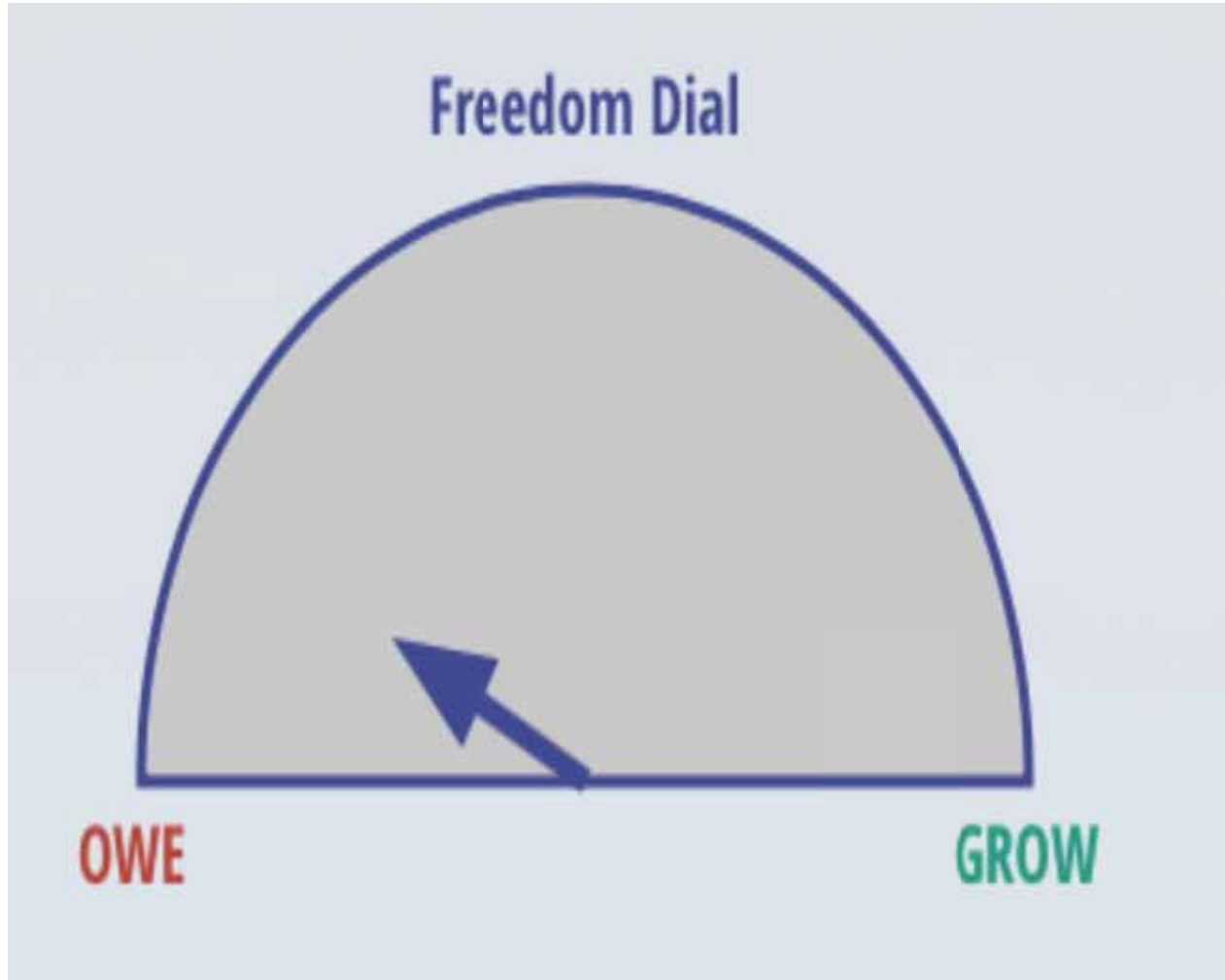
THE COMPARISON THAT MATTERS

OGLG NOW AND LATER



The FOUR outcomes of OWE-GROW-LIVE-GIVE

- FREEDOM



The FOUR outcomes of OWE-GROW-LIVE-GIVE

COMFORT



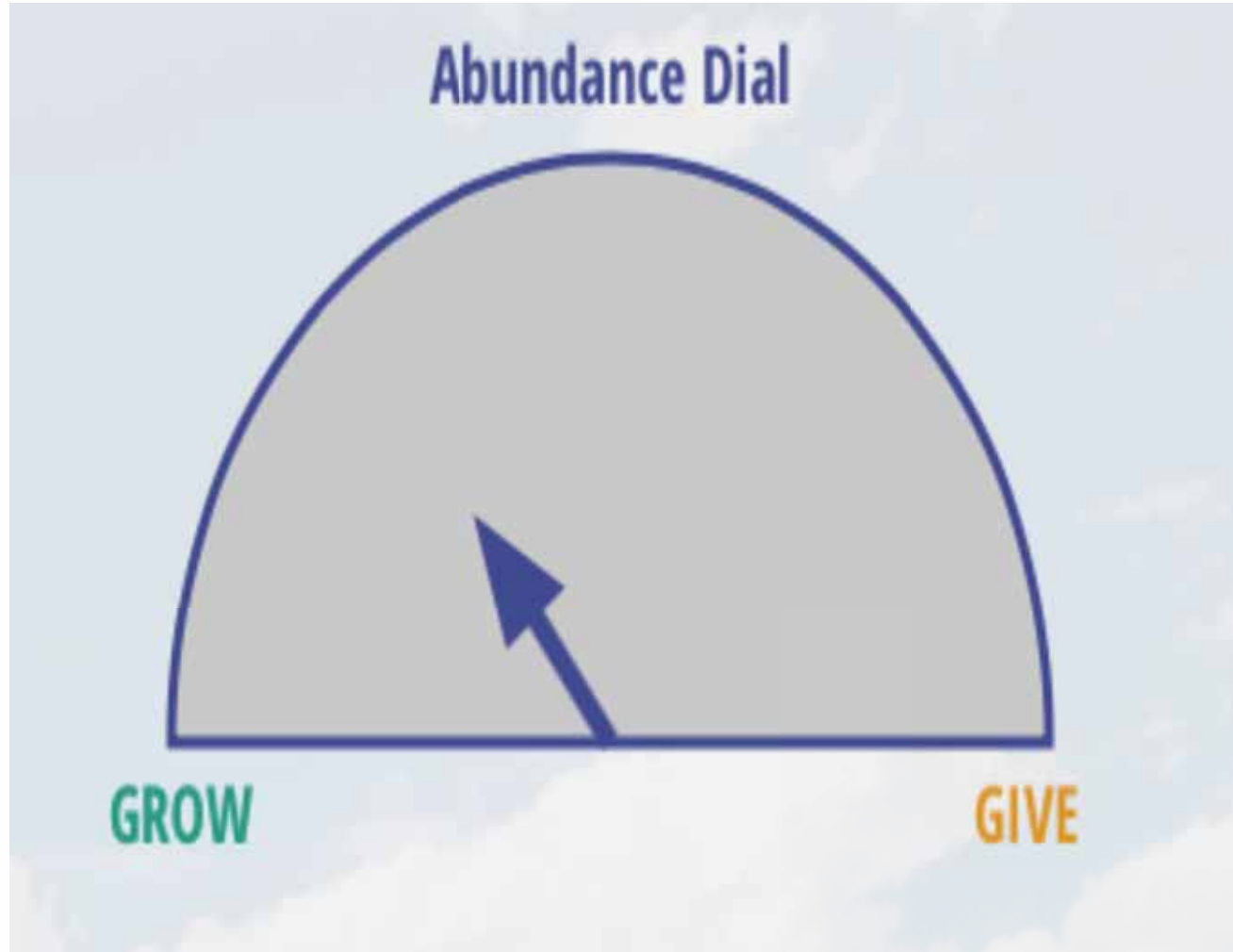
The FOUR outcomes of OWE-GROW-LIVE-GIVE

- PURPOSE



The FOUR outcomes of OWE-GROW-LIVE-GIVE

- ABUNDANCE



WANT TO DO LIST

Worksheet— Owe, Grow, Live, Give



OWE

JOIN MYFLPTOOLS.COM

- MITCHANTHONY.COM



Username and Password Sent

- Login and go to My Profile



The screenshot shows a dark-themed user profile page. At the top left, there is an orange icon of two people and the text "Edit Your Profile". Below this is a square profile picture of a man with a mustache, wearing a dark jacket over a light shirt. Underneath the photo is a small white caption: "N. Loner © 2007 Loner Photography & Studio". To the right of the photo, the name "Mitch Anthony" is displayed in large white font. Below the name, contact information is listed in white text: "work 507.282.2723", "mobile [Add your mobile number](#)", "e-mail mitch@mitchanthony.com", and "website mitchanthony.com".

MAKING THE LINK—Send to your Web Administrator



Link

OWE-GROW-GIVE-LIVE

to your website

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