

Design Your Life, Design Your Money



You are planning or a family camping trip in North Georgia and getting all of your supplies together. Before you go brave a trail of hiking, you must have maps.

Why do most people NOT approach their lives the same way?

Preparing your annual/semi-annual goals are critical in order to have a clear map of where you want to go. If you don't have some sort of blueprint on where you want to go, how would you know what the right supporting activities are, so that you may get there?

Many people just let life just happen. However, good and bad things don't just occur - there are many aspects within our control. You can make your own destiny by designing your life through setting your own goals and deciding who you want to be; think of it as your internal controls over what happens (inside-out) as opposed to letting things randomly happen (outside-in).

Every year, I do an exercise where I list on paper all of the qualities and skills that I want in order to be what I believe is my best self. I set up my goals around these qualities and skills and come up with all of the supporting activities that I need to do and who I need to ask to help me in order to get there.

Your financial world is no different.

Many people I meet claim to have a financial advisor, which is typically someone who is overseeing only an investment portfolio. This is not a financial planner. A financial planner builds a true blueprint detailing where you are and helps to design your goals for where you want to be. A planner does the crucial tasks to crunch the math and helps you figure out how to get where you want to go.

Most financial professionals have one specialty, which could be insurance, investments, taxes or legal. These people are not coordinating on your behalf. I suggest that you design your financial world first with the end in mind. Build your blueprint FIRST with your financial planner, similar to a general goal setting exercise, and then have your team execute by setting up accounts, legal documents, tax returns, etc.

Design your life and your money by always starting with the core blueprint or map before you hike the trail or implementing financial transactions. Inside-out, not Outside-In.

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Ms. Moore can be reached via email at moore@moorewealthmgmt.com or telephone at (770) 587-0281. Her website address is www.moorewealthmgmt.com.

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