



Course Overview

Scaled Finance Welcome Course: Overview

Welcome!

Thank you for your interest in the course.

My goal is to help you take control of your finances!

There's no cost and I won't try to sell you anything. I feel:

- Everyone deserves to be empowered, not just the wealthy.
- Reducing money stress and achieving goals helps people live great lives.
- Wonderful people have helped me and my family on our journey. I feel a responsibility to give back.

I'll share the frameworks my family and I have found most helpful on our path.

All of this is general education. It's intended to help everyone!

None of it represents financial planning.

No financial advice will be given during the course.

Doing so would require a much better understanding of your specific situation.

No Financial Advice

The Course

The course is comprised of 11 video sessions.

Each episode will include a .pdf and sometimes Google sheets.

The episodes will be emailed to you weekly.

I appreciate it when I can engage content at my own pace and reference it later, so I dedicated a webpage. The link will be shared with those who register.

Episodes

This course will cover:

Eleven Core Topics

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| <p>Welcome</p> <ol style="list-style-type: none"> 1. Why It Matters: Things Change 2. Why Care? 3. Your Best Life: 3 Questions 4. Net Worth: What It Is and Isn't 5. Forecast the Potential | <ol style="list-style-type: none"> 6. Financial Independence 7. Buy and Maintain Quality 8. Mobile Lounges 9. Home to Stay 10. Replace Services with Products 11. Spending, in Hours |
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Part One: Why

1. **Why It Matters: Things Change**

Part One leverages Simon Sinek's [great work](#). Why do your finances matter?

Job and health situations change.
Financial preparation can make all the difference.

2. **Why Care?**

Episode 2 discusses three more reasons to care about personal finances:

- Here for the rest of your life
- Enables work flexibility
- Supports new passions

These are why I feel personal finance is important enough to do it full-time!

3. **Your Best Life: 3 Questions**

Episode 3 focuses on helping you clarify your life plan.

We'll work through three excellent questions created by George Kinder and the [Kinder Institute of Life Planning](#).

Then we'll double-click and prioritize an action plan.

Part Two: Net Worth

4. **Net Worth: What It Is and Isn't**

Part Two focuses on net worth – what it is, how to forecast it, and what it means for financial independence.

Episode 4 defines net worth, goes through examples, and discusses some applications as well as limitations.

You'll then leverage a Google Sheets template to estimate your net worth. Knowing your net worth will be key for the other Part Two exercises.

5. Forecast the Potential

Episode 5 leverages a prettier version of what guided my family's financial journey for years.

We'll go through a theoretical example to see how net worth might trend over the course of 15 years based on broad assumptions. You'll take it from there.

6. Financial Independence

Episode 6 introduces the 4% guideline as well as some of its limitations.

Part Three: Ownership

7. Buy and Maintain Quality

Part Three focuses on ownership.

Episode 7 explores everyday examples of long-term ownership. (Hint: additional purchases may be required.)

It also includes a brief introduction to Minimalism.

8. Mobile Lounges

Episode 8 discusses automobile ownership:

- New vehicle depreciation
- Lease vs. buy
- Dependable quality and well-priced luxury
- Caring for vehicles
- Ways to extend vehicle life

9. Home to Stay

Episode 9 dives deep into the cost of buying, selling, and maintaining a home.

This episode also explores the cost of upgrading.

10. Replace Services with Products

Episode 10 highlights opportunities to replace ongoing costs with one-time buys.

Lawn care, router, cable, movies, meals out, hair maintenance, etc.

11. Spending, in Hours

Episode 11 leverages Vicki Robin and Joe Dominguez's great book [Your Money or Your Life](#).

This final episode will walk through a 7-step process to evaluate expenses in terms of life hours.

Next Steps

If You're Ready, Sign Up

The first week includes the:

- Welcome email, video, and PDF (which is an extended version of this file)
- Episode 1 email, video, and PDF

Subsequent weeks each include one episode.

Whether or not you register for the course, let's connect on social media:

- [LinkedIn](#)
- [Facebook](#)

Additional complimentary resources will be posted there!

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