

# BUDGET PART 1

## *1. Review*

- Homework from the Game plan completed?

## *2. Budget Part 1*

- See if they have any questions on the Budget Spreadsheet Walkthrough they went through as homework and if need be, rewatch at the Budget Part 1
- Review their budget sheet (Clarifying questions may need to be asked)
- Go through Variable and talk about possible adjustments they can consider (especially when it comes to redirection of Groceries and Eating Out)
- Assign homework below

## HOMEWORK

### THINGS TO DO PRIOR TO THE BUDGET PART 2...

- Go through the INVESTMENT BLUEPRINT concept.

### WHATS APP MESSAGES TO SEND PRIOR TO BUDGET SESSION PART 2...

- Sharing the dollar amount you have decided to commit for monthly personal consumption that will be a first of the month Autoship order

# BUDGET PART 2

## *1. Review*

- Homework from Budget Part 1 completed?

## *2. Budget Part 2*

- Input the budget dollar amount chosen by new IBO onto budget excel spreadsheet (this was the homework item from the Part 1 budget)
- Go over Action Plan portion of spreadsheet

## *3. Book the Transition to Partnership meeting*

## *4. Send fillable 'Transition Meeting Intake Form' link to new IBO to fill out prior to Transition Meeting*

## *5. Assign homework below...*

## HOMEWORK

### THINGS TO DO PRIOR TO THE TRANSITION MEETING...

- Go through the appropriate Onboarding Folder
- Complete the fillable intake form