

THE MONEY WORKSHEET

GRAB A NOTEBOOK, MAKE YOURSELF A TEA, GET COZY, AND LET'S DIVE IN!

PERSONAL TRANSFORMATION QUESTIONS:

- What did your parents (and/or stepparents or caretakers) do for a living while you were 0-14? (We tend to model our level of success based on our same-sex parent(s). Sometimes the opposite but mostly our same).
- What was your mother and father's (or caretakers) relationship to money and self-worth while you were 0-14? Are you in a similar situation?
- If you are a woman, did you have a mother who stayed at home and was utterly reliant on outside sources to support her (wealth, a husband, family, etc.)? Do you find yourself in a similar situation or unable to support yourself?
- What was the economic state of the community you grew up in? Especially those that you were close with and identified with? Do you find yourself in a similar economic state now?
- What were conversations around money like? Positive or negative?
- What was money used for? Survival? Control? External validation? Manipulation? Perfectionism? Status?
- Did money represent something that made you resent it? Say a terrible divorce battle, abandonment, no attention because of a working parent, greedy parents, family members or friends? Was money the only way your parents showed love?
- What was the programming surrounding money in your family? Could it fix everything? That marrying well is the only way to succeed? Is money bad? Are rich people bad? Are rich people the only valid people? It's all just programming, so dig and find what yours was.
- Were you put down or inferior because you didn't have money?
- What other types of shame surround money for you?
- Have you had anyone you love use you for money?
- Were you encouraged by your caretakers, siblings, and teachers that you could be successful from your passions and talents? or shamed?

- What age (and potentially memory) did you even become aware that such a thing as money existed?
- What does money represent to you today? Why do you long for it? (True honesty - is it to fill a hole or unworthiness?)
- Were you encouraged or forced to do things for money that felt shameful or not in alignment with your heart?

BUSINESS TRANSFORMATION QUESTIONS:

- Given the amount of time you spend coaching a client and the work that goes on behind the scenes (creating meal plans, putting together protocols, reviewing intake forms, etc, etc) - how much time does it REALLY take to work with a client?
- How much are you currently charging your clients?
- What are your colleagues charging?
- Have you ever dreaded getting on a call with a client and/or meeting with them for their appointment? (if yes - this can often be a sign of not being on your growth edge!)
- Results are what drives pricing. When you have a specialty, you need to price yourself based on what you can achieve for someone and not just on the work itself. Greater results are equivalent to higher prices, but they cannot be quantified in terms of hours. What are the results your clients achieve while working with you?
- Have you ever discounted your fees/rates just to work with someone because you needed the money? How did this make you feel? What was your experience like working with this person?
- What are you worth per hour? Per half hour?

YOUR ONE YEAR VISION:

- What is your yearly revenue goal?
- What is your yearly profit goal?
- What are your current monthly expenses?
- What do you need in place to hit these numbers? (ie. Mentorship, coaching, tech platforms, dedicated time, website designer, etc, etc)
- What are the three biggest issues in your way?