

# *invest in yourself: a women's wealth workshop*

## ***Complete Before Attending***

- Capture your "Net Worth" by creating an account at [Mint.com](http://Mint.com)
  - Link all investment & bank accounts
  - Enter / link all loans & debts
  - Create a budget using Mint's free tool

Signup for a free account at [CreditKarma.com](http://CreditKarma.com)

- (Optional) Get a free credit report (report, not score) at [annualcreditreport.com](http://annualcreditreport.com). (No credit card needed, completely free. Pick any bureau: Experian, Equifax, or TransUnion, it doesn't matter.)

Lookup your current "Expense Ratios"

Lowest Fee: \_\_\_\_\_% Highest: \_\_\_\_\_%

- Login to your investment account and see what funds you are invested in. Then Google the fund symbol and look for "fees & expenses." For example, Fidelity's Freedom 2040 Fund (FFFFX) has an Expense Ratio of 0.78%.

What are your financial goals?

- 1.) \_\_\_\_\_
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_

## ***Complete During Workshop***

- Decide if you are:
  - A Do-It-Yourself Investor
  - A delegator

The next actionable steps I need to take are:

- 1.) \_\_\_\_\_
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_

- Create a deadline to take action: \_\_\_ / \_\_\_ / \_\_\_\_\_

- Who is your accountability partner? \_\_\_\_\_

- These questions linger:

- 1.) \_\_\_\_\_
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_

- My following friends need to hear this info:  
\_\_\_\_\_