

# Financial

C O M P A S S

Planning for  
**WEALTH, HEALTH,**  
and **HAPPINESS**  
in **2021**

## Want help putting together your Action Plan?

Tap below to join the discussion. See the goals & action plans of other real estate investors! Connect, collaborate and accelerate your real estate inside the Connected Investors Smart Forum.



### Writing Goals for 2021

Start With Your Vision of Financial Success. **Comment your answers to the first 4 questions.**

By: (date)

I will: (A specific and measurable goal)

To accomplish this, I will give:

This is important because:

By: [Ross Hamilton](#) in [Wilmington NC](#)

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# Financial COMPASS

## DAY 1: Wednesday



**Ross Hamilton**

*Sofa Summit Kick-Off*



**Dave Stech**

*Economic Outlook & How to Election-Proof Your Income*



**Sharee Reese**

*From Broke to Financial Freedom in 3 Months*



**Kevin Earnest & Dave Maurer**

*Mom & Pop Versus Wall Street*



**Doug Maners & Patrick Giarelli**

*Million-Dollar Case Studies*



**Jason Harthan**

*Luxury Homes to Land: Flipping in 2021*



**Ed Diamond & Bob Diamond**

*Loophole in Foreclosure Process Exposed*



**Robert Nickell**

*Strategies of Billion-Dollar Flippers That You Can Apply*



**Shawn Woedel**

*Managing Your Assets*



*New Micro-Flipping Strategies in 2021*

## DAY 2: Thursday



**Ross Hamilton**

*Sofa Summit Day 2*



**Dave Stech**

*2021 Goal Setting  
10 Things To Do NOW To Be A VICTOR Not A Victim in 2021*



**Shawn Keding & Patrick Giarelli**

*Turn A Phone Call Into Profits*



**Marty Coyne & Ross Hamilton**

*Reinvention of Real Estate Investing*



**Lee Arnold**

*Making A Fortune Lending OPM*



**Marty Coyne & Robert Greeberg**

*Inside The Mind Of A Private Lender*



**Cris Chico**

*Virtual Wholesaling*



**Clinton Paquin**

*Using Big Data To Make Big Profits*



**Matt Leitz**

*Use Actual Bots To Flip Houses*



*Secrets of REI Success*

**For More Information, Visit:**



## Your Vision of Financial Success

By: \_\_\_\_\_

I will: \_\_\_\_\_

To accomplish this, I will give: \_\_\_\_\_

This is important because: \_\_\_\_\_



## Your Vision of Personal Success

By: \_\_\_\_\_

I will: \_\_\_\_\_

To accomplish this, I will give: \_\_\_\_\_

This is important because: \_\_\_\_\_



## Your Witness

I pledge to hold \_\_\_\_\_ accountable for achieving the goals written above.

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Your Witness

Your witness needs to simply ask you how you are doing with your “I will” statement, ask you what is holding you back to achieve your goal faster, then ask you what you are going to do to solve the issue holding you back. They are not to provide advice. Just ask and listen.

## Overcome Your Fears

**What are you not going to bring with you in 2021?**  
*In order to reach my desired goal I will no longer:*

Many times more important than a to-do list is a not-to-do list.  
List out the top habits you are no longer going to do:

1.A. I will no longer: \_\_\_\_\_

1.B. Because if I do: \_\_\_\_\_

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2.A. I will no longer: \_\_\_\_\_

2.B. Because if I do: \_\_\_\_\_

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3.A. I will no longer: \_\_\_\_\_

3.B. Because if I do: \_\_\_\_\_

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## Overcoming Moments of Weakness

Breaking a habit is one of the most challenging mental exercises. There will be times when your mind will use tricks to convince you on why it is “OK” to fall back into a habit.

What will you do to stay on track?

## Strategic Plan

### Alignment of Purpose With Passion - Personal Philosophy:

Every person has a personal philosophy, consisting of some rules adopted from one's parents, culture, religion, acquaintance, and so on. Generally speaking, these rules, as a body, are not well thought out and contain a wealth of inconsistencies and contradictions.

**Legacy Statement:** Your legacy serves as your life's defining statement. It serves a two-fold purpose. First it provides an overarching framework for all mission statements and goals to follow. Second, it answers the question, "What do I want to be remembered for?"

**Mission Statement:** A mission statement is a declaration of who you are, why you exist, and what you intend to accomplish. In business, the organizational mission answers the big question: "What is our business?" In personal planning, the question is "What is my life's business?" In both cases, the answer must define the reason for being.

**Core Values:** Our values act as our compass, guiding us through life's terrain. One certain way of knowing that you are living in accordance with your values is by defining guidelines and measurements for value-centered living.

**Code of Ethics:** Words quietly influence our attitudes and opinions. Codes of conduct, personal creeds, and pledges all reflect an effort to make sense of things, to organize behavior, and to better understand ourselves.

**Lifetime Objectives:** Your objectives should be written within the framework of your Legacy & Mission Statements. The key to any Personal Strategic Plan is to visualize your desired outcomes in advance. Be sure to write and rewrite your Lifetime Objectives as affirmations of the future you are working to realize.

**Personal Board of Directors:** A personal board will accelerate your progress by providing both wisdom and support for the attainment of a specific purpose.

**Maintenance & Performance Check-Ups:** On a monthly basis, you should pause to evaluate your performance. What progress have you made? Where have you been challenged? What do you need to do differently or more of? It is also important to step back and consider whether any of your goals are unachievable.

**Personal Reason Why:** You won't become successful until and unless you identify, support, and empower your reasons why. Your whys provide fuel for achievement, and are the reasons behind all action and inaction. The hallmark of all high achievers is a burning why. They know what they want, how and when they will achieve it, but most importantly, they know WHY they want to become successful at achieving their goals.

**Goals:** The key in writing your goals is to make them measurable, specific, and time-bound. Goals need to be written for each of the ten critical areas of life to include: Personal, Health, Recreation, Family, Friends, Community, Career, Financial, Household, and Spiritual.

## Reflection

1. What is your personal definition of greatness? What does greatness look like to you?

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2. What is your mission in pursuing greatness? What is your purpose?

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3. What do you want your life to look like 5 years from now? Create a specific and detailed vision below.

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4. What advice would you like to give yourself in 2021?

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5. What is the major step you plan to take to improve your financial results in 2021?

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6. What would you most like to change about yourself in 2021?

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7. What are you looking forward to learning in 2021?

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8. What is one as-yet undeveloped talent you are willing to explore in 2021?

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## Real Estate Investing Game Plan

**There are basic building blocks of every real estate investing business.**

1. How much money do you want to make in 2021?
2. What is your primary real estate investing strategy in 2021?
3. How do you plan on finding investment-grade properties in 2021?
4. How do you plan to fund your real estate investments in 2021?
5. How do you plan on further building your connections / network in 2021?
6. Who do you need on your team in 2021?

Knowing that you have big goals for your real estate investing business, what do you need to achieve in order to get there?  
Write at least three.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What commitments must you make in order to become what you've set out to become?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What obstacles do you feel you will encounter while trying to achieve your goals for greatness?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What will you need to do to overcome these obstacles? Make a game plan before you actually encounter these obstacles and commit to being courageous in the face of these obstacles.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Break Down Your Big Intimidating Goals Into Simple Steps

Make sure all your goals are **SMART**.

### SMART Checklist:

**S**pecific **M**easurable **A**ttainable **R**ealistic **T**imely

### PERSONAL GOALS

#### Long term Goal #1:

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#### Short-term Goal:

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#### Short-term Goal:

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#### Long term Goal #2:

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#### Short-term Goal:

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#### Short-term Goal:

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## HEALTH GOALS

### Long term Goal #1:

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### Short-term Goal:

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### Short-term Goal:

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### Long term Goal #2:

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### Short-term Goal:

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### Short-term Goal:

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## RECREATIONAL GOALS

### Long term Goal #1:

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### Short-term Goal:

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### Short-term Goal:

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### Long term Goal #2:

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### Short-term Goal:

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### Short-term Goal:

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**FAMILY GOALS**

A good exercise is to write down all the “hats you wear” and create goals around each of them. For instance. Wife, Father, Sister, etc.

**Long term Goal #1:**

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**Short-term Goal:**

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**Short-term Goal:**

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**Long term Goal #2:**

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**Short-term Goal:**

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**Short-term Goal:**

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## FRIENDSHIP GOALS

### Long term Goal #1:

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#### Short-term Goal:

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#### Short-term Goal:

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### Long term Goal #2:

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#### Short-term Goal:

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#### Short-term Goal:

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## COMMUNITY GOALS

### Long term Goal #1:

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### Short-term Goal:

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### Short-term Goal:

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### Long term Goal #2:

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### Short-term Goal:

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### Short-term Goal:

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## CAREER GOALS

### Long term Goal #1:

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### Short-term Goal:

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### Short-term Goal:

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### Long term Goal #2:

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### Short-term Goal:

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### Short-term Goal:

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## FINANCIAL GOALS

### Long term Goal #1:

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#### Short-term Goal:

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#### Short-term Goal:

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### Long term Goal #2:

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#### Short-term Goal:

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#### Short-term Goal:

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HOUSEHOLD GOALS

Long term Goal #1:

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Short-term Goal:

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Short-term Goal:

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Long term Goal #2:

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Short-term Goal:

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Short-term Goal:

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## SPIRITUAL GOALS

### Long term Goal #1:

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#### Short-term Goal:

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#### Short-term Goal:

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### Long term Goal #2:

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#### Short-term Goal:

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#### Short-term Goal:

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