

money garden + number tracking

The Launch / December 5, 2022 / with Jenny Girl Friday / Session 3

♥ Good to see you again! And remembering:

Being a great boss / Thriving / Taxes + Business chores

Today's Top Goals

You can say:

- ☞ Yes! I want to work with money more
- ☞ I'm excited to create my own system for tracking numbers
- ☞ I will find rates that support my thriving life
- ☞ Bonus: I will put time in my schedule for this important work

♥ Money Garden

Warming up

Working with our whole selves / Reflections and sharing

Context

Mainstream + Cultural Views

Pitfalls / Lifelines

Observe that stories and emotions affect our behaviors / some more metaphors

Taking Care of Money Garden

Why a garden?

4 Parts + Tending Menu

Q&A / Circle the one's interested in

Next Steps

// Break //

♥ Number Tracking

Levels

Requirements / the govt

Actual paycheck / you

Analysis + Details / the biz + thriving you

The A, B, Cs

A – Accounting, the story of your money

B – Bookkeeping, tracking the details

C – Schedule C, the most important document – a version of a P and L

Your custom system

What numbers do you need to track?

Income, Expenses, Details

Want to track?

Your preferred tracking method – spreadsheet, Quickbooks, notebook, other?

Your rhythm and cues

Moving Parts

Your paycheck needs?

Estimated Quarterly Tax Payments

Your effective tax rate with the IRS

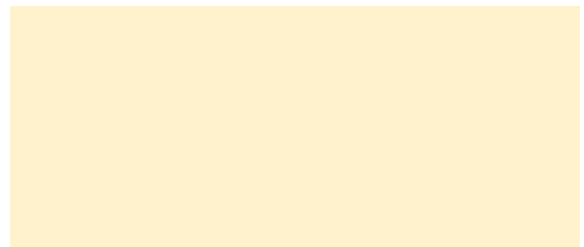
Work Math

♥ Closing

The Goals

Calendar time

Final sharing



reflection on money stories

Initial Answers

Notes for later

<i>How would you define money?</i>		
<i>Where did you learn about money ... as a child, teen, adult? What did you learn?</i>		
<i>People with money tend to be...</i>		
<i>Do you think money changes people?</i>		
<i>How much do you care about money?</i>		
<i>How do you feel about money, numbers, paying taxes ...</i>		
<i>What is one of your biggest challenges or stressors with money?</i>		
<i>What's a good habit or attitude that you have? That you feel proud of or works well?</i>		

next steps

Name a shift you would like to make with money - a new attitude, reframe, knowledge to acquire, skillset to develop.

Action 1	When	Resources

Describe a new money tending habit you would like to build:

Action 1	When will it happen?	Resources