

THE FINANCIAL TREATMENT ROADMAP

A financial plan tells you what needs to happen. A financial system helps make sure it actually happens.

You don't need to handle your entire financial life today. You need to move one important thing forward.

You've already identified your priorities. Now turn one of them into action.

01 CHOOSE YOUR PRIORITY

ONE PRIORITY - NOT TEN

From your Episode 12 financial triage, what's the ONE financial priority you're moving forward now?

MY FINANCIAL PRIORITY

02 DEFINE WHAT 'HANDLED' LOOKS LIKE

THE TASK IS NOT THE OUTCOME

What specific result would tell you this priority is actually completed?

HANDLED MEANS

EXAMPLE Priority: Review disability insurance coverage.
Handled: Appropriate coverage is selected, issued, and confirmed in force.

03 CHOOSE YOUR EXECUTION PATH

ALL THREE PATHS ARE VALID

☐ **DIY**

DO IT YOURSELF

I'll coordinate and execute this myself.

☐ **DWY**

DONE WITH YOU

I'll get expert guidance and retain responsibility for next steps.

☐ **DFY**

DONE FOR YOU

I'll delegate coordination while staying involved in key decisions.

YOUR EXECUTION ROADMAP

PRIORITY 1

Turn one priority into a clear sequence of ownership, action, and proof.

FINANCIAL PRIORITY

SCHEDULE > ASSIGN > EXECUTE > VERIFY > REPEAT

01 SCHEDULE

What's the next implementation meeting or action?

DATE

TIME

WITH WHOM

BAMFAM: Book a Meeting From a Meeting. Before one conversation ends, schedule the next.

☐

My next implementation action is on my calendar.

02 ASSIGN

One person must own the outcome, even when several people are involved.

PRIMARY OWNER

OTHERS INVOLVED

NEXT RESPONSIBILITY

03 EXECUTE

What's the next meaningful action?

ACTION

WHO WILL COMPLETE IT

TARGET DATE

04 VERIFY

How will you know the intended outcome actually happened?

EVIDENCE OF COMPLETION

WHO CONFIRMS IT

VERIFICATION DATE

Activity isn't the same as progress. Verify the outcome.

05 REPEAT

Once this is handled, what's the next priority you'll address?

NEXT PRIORITY

NEXT CHECK-IN DATE

Keep this lightweight. You do not need to plan every future action today.

YOUR EXECUTION ROADMAP

PRIORITY 2

Turn one priority into a clear sequence of ownership, action, and proof.

FINANCIAL PRIORITY

SCHEDULE > ASSIGN > EXECUTE > VERIFY > REPEAT

01 SCHEDULE

What's the next implementation meeting or action?

DATE

TIME

WITH WHOM

BAMFAM: Book a Meeting From a Meeting. Before one conversation ends, schedule the next.

☐

My next implementation action is on my calendar.

02 ASSIGN

One person must own the outcome, even when several people are involved.

PRIMARY OWNER

OTHERS INVOLVED

NEXT RESPONSIBILITY

03 EXECUTE

What's the next meaningful action?

ACTION

WHO WILL COMPLETE IT

TARGET DATE

04 VERIFY

How will you know the intended outcome actually happened?

EVIDENCE OF COMPLETION

WHO CONFIRMS IT

VERIFICATION DATE

Activity isn't the same as progress. Verify the outcome.

05 REPEAT

Once this is handled, what's the next priority you'll address?

NEXT PRIORITY

NEXT CHECK-IN DATE

Keep this lightweight. You do not need to plan every future action today.

YOUR EXECUTION ROADMAP

PRIORITY 3

Turn one priority into a clear sequence of ownership, action, and proof.

FINANCIAL PRIORITY

SCHEDULE > ASSIGN > EXECUTE > VERIFY > REPEAT

01 SCHEDULE

What's the next implementation meeting or action?

DATE

TIME

WITH WHOM

BAMFAM: Book a Meeting From a Meeting. Before one conversation ends, schedule the next.

☐

My next implementation action is on my calendar.

02 ASSIGN

One person must own the outcome, even when several people are involved.

PRIMARY OWNER

OTHERS INVOLVED

NEXT RESPONSIBILITY

03 EXECUTE

What's the next meaningful action?

ACTION

WHO WILL COMPLETE IT

TARGET DATE

04 VERIFY

How will you know the intended outcome actually happened?

EVIDENCE OF COMPLETION

WHO CONFIRMS IT

VERIFICATION DATE

Activity isn't the same as progress. Verify the outcome.

05 REPEAT

Once this is handled, what's the next priority you'll address?

NEXT PRIORITY

NEXT CHECK-IN DATE

Keep this lightweight. You do not need to plan every future action today.

The goal isn't to become a better financial project manager.

IT'S TO BUILD A FINANCIAL LIFE THAT DOESN'T REQUIRE YOU TO BE ONE.

WANT HELP GETTING THE IMPORTANT THINGS HANDLED?

If you'd rather have a team helping coordinate your priorities and follow-through, explore the IM Wealth Financial Diagnostic.

imwealth.com/diagnostic

