

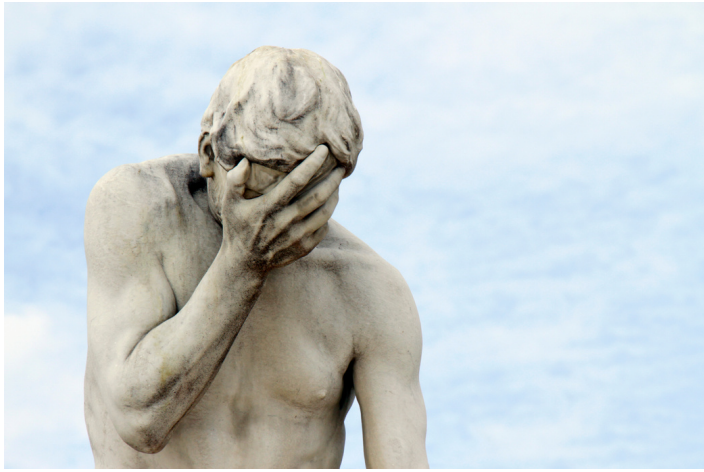
# Wealth By Design

*Building Prosperity for Your Life, Your  
Practice, and Future Generations*

# You will need:

- Camera on (you'll be doing peer workshopping in small groups so it's important to see your face)
- To have every person in your team on a separate device for breakouts. They need to be logged into this call on zoom and muted while not in breakouts.
- Right click on the three lines on your video & change your name on Zoom to add your Quest status to the front of your name. eg. CT (Captains Table), O (Ocean), T (Team) or G (Guest)
- We will be together for the first hour, seperate as Chiropractors and CAs rooms, then come back together for the summary.
- Please play full on
- Move fast - a fast game is a good game
- Remember that all of us is smarter than any one of us





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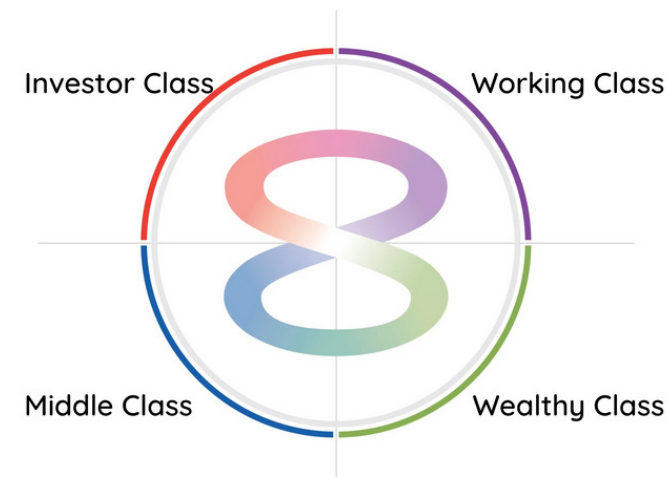
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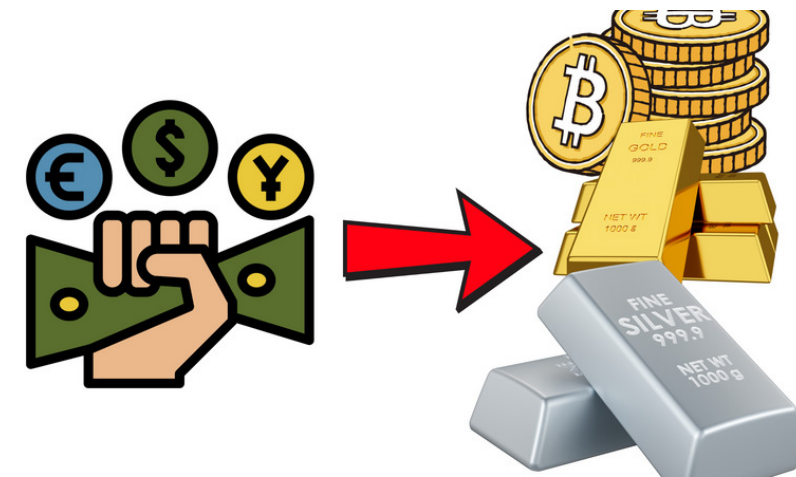
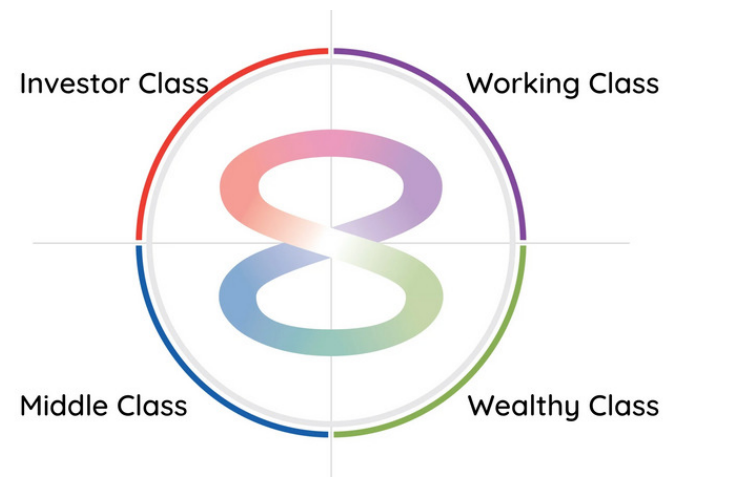
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Generation

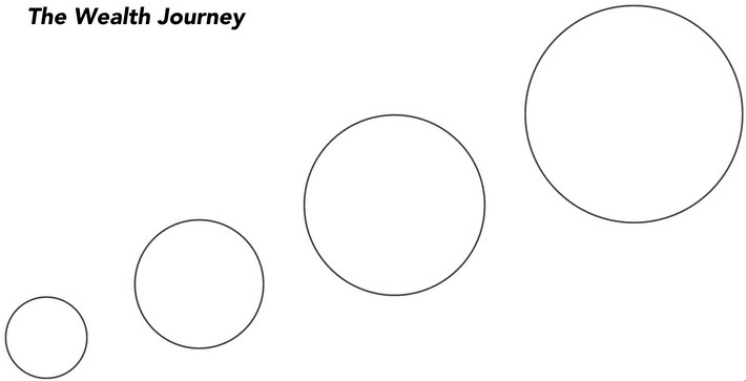
Stewardship

Compounding

Investing

Saving

*The Wealth Journey*



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## ***“Possible Actions I Could Take”***



***"What legacy am I intentionally building?"***

***"My next small step toward financial strength"***

# Wealth By Design: Action Plan

## My Personal Wealth Habits

Choose one habit to strengthen your financial future.  
When you have completed that choose another.

- ☐ Save 10% of all income
- ☐ Track all spending for 30 days
- ☐ Start an investment or savings account
- ☐ Set up automatic savings transfers
- ☐ Create a household budget
- ☐ Hire someone to do some chores you don't like doing
- ☐ Pay down consumer debt
- ☐ Reduce non-essential spending
- ☐ Buy some stocks, gold, silver, BTC
- ☐ Dollar Cost Average investments
- ☐ Educate myself about wealth-building
- ☐ Follow your investments at least every week
- ☐ Have a wealth conversation with family/team
- ☐ Others:

## Our Practice Growth Steps

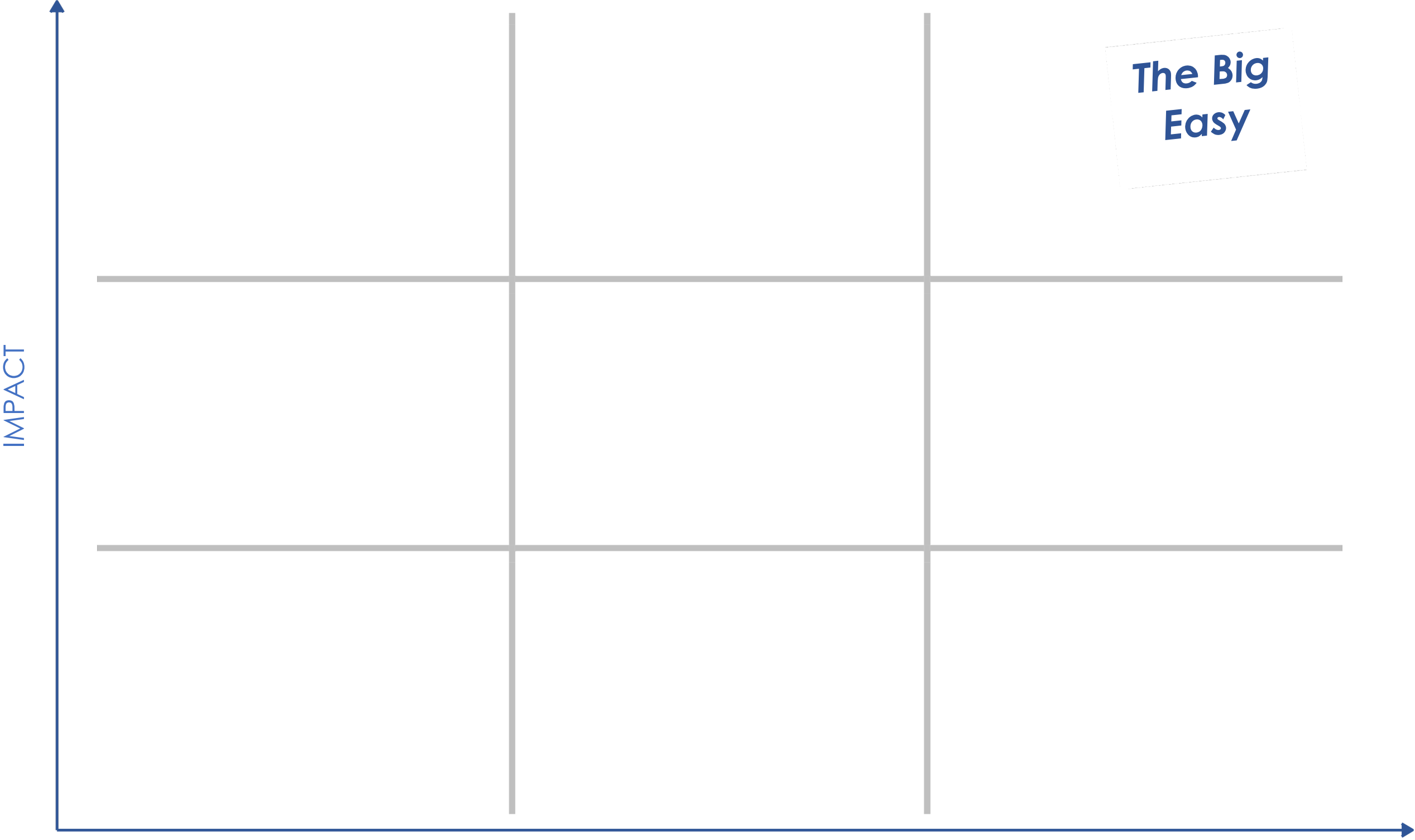
One way our team can increase value, service,  
and prosperity in the next 60 days:

- ☐ Improve Practice Member collections processes
- ☐ Celebrate chiropractic value more clearly
- ☐ Consider an increase in your fees
- ☐ Refine Practice Member communication for ascension
- ☐ Review your internal referrals procedures
- ☐ Review your scheduling follow through
- ☐ Consider implementing a new value add to the practice
- ☐ Review your team upskilling process
- ☐ Have a Planning Meeting with your team
- ☐ Others:

***Reflections***

***Implementations***

The Impact Planner



The Ocean

EASE



# The Impact Filter

Problem   What problem are we solving?
Impact   What difference will it make?
Outcome   What will the result look like?
Best Case:
Worst Case:

WHAT ARE THE SUCCESS CRITERIA?

WHAT ARE THE FIRST STEPS?

1

2

3

The Ocean