

# My IDEAL Client Summary



## My IDEAL Client's Identity

My IDEAL Client's name (or Nickname), title, age, education

1

## My IDEAL Client's Money Situation

My IDEAL Client's situation with relation to income, financial health, spending habits and accountability.

3

## My IDEAL Client's Lifestyle Situation

My IDEAL Client's situation with relation to where they work and live, their career, life stage and who they serve.

## My IDEAL Client's Mindset

My IDEAL Client's situation with relation to their beliefs, desires, what they worry about and what are the opportunities available to them right now?

5

## FINAL STEP: My IDEAL Client Success Path Progress

- ☐ I have completed my IDEAL Client Chooser
- ☐ I have completed my IDEAL Client Profile
- ☐ I have created a one-page summary (this doc)
- ☐ I have completed at least one Client Interview

Take a selfie with your My IDEAL Client Summary and post it in the Facebook group!