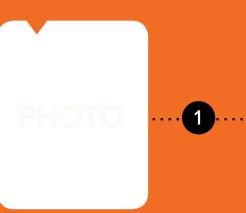


My IDEAL Client Summary



My IDEAL Client's Identity

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

My IDEAL Client's Money Situation

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

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?

FINAL STEP: My IDEAL Client Success Path Progress

- I have completed my IDEAL Client Chooser
 I have completed my IDEAL Client Profile
- $\hfill\square$ 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!



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