

WIN MAKE GIVE



WEALTH SERIES

2.0

PART ONE

Financial Health & Building Wealth

A FEW WORDS FROM BEN KINNEY

Welcome to the Win Make Give Wealth Series 2.0.

If money, debt, wealth building, retirement, and investing has ever been a concern, or you simply have a desire to learn more about financial wellness, you are in the right place.

Wealth Series 2.0 is an updated and expanded version of what we launched three years ago. The team at Win Make Give launched the first Wealth Series in 2020 when the world was at a standstill. But, with 25,000 signups in the first month and quadruple the attendees since, we decided we needed to keep the momentum going and provide even more value with updated content for our listeners in 2023.

In this series, you can expect more content and updated workbooks, but we still operate under the same premise – teaching people what it means to attain real wealth in a manageable, easy-to-understand way.

I truly believe this wealth journey will be life-changing for you. I only ask that you participate fully, get uncomfortable, and come ready to learn and take action to improve your life forever.

Whatever it takes,



A handwritten signature in black ink that reads "Ben Kinney". The signature is fluid and cursive, with a long horizontal stroke at the end.

Ben Kinney

Win Make Give Founder

Instructions

Every lesson, workbook, and tool will be emailed directly to the email that you used to register for the *Win Make Give* “Wealth Series 2.0.” Please check your junk, spam, and promotions folders and mark the email from team@winmakegive.com as safe!

Each email will include a podcast link and a downloadable workbook that you can save as a PDF and print. Certain lessons will have additional tools and resources for you to save and utilize.

The content is on-demand, giving you the freedom to learn on your schedule or re-listen to multiple times. We suggest listening to each lesson first, then re-listening with the workbook in front of you so you can complete the homework.

To help you get the most out of this experience, we have created an online community you can access anytime in the [Win Make Give Facebook Group](https://www.facebook.com/groups/WinMakeGive) (facebook.com/groups/WinMakeGive). It’s here you can ask questions, share takeaways, get help with the assignments, and build new relationships with like-minded individuals from all over the world.

**All of the series resources can be found at:
<https://winmakegive.com/get-resources/>**

**Our suggested reading list of wealth books can be found at:
<https://winmakegive.com/top-wealth-books/>**

WEALTH

defined



The ability to do _____
I _____, _____ I
want, with _____ I want.

WEALTH



“Don't let the opinions of the average man sway you. Dream, and he thinks you're crazy. Succeed, and he thinks you're lucky. Acquire wealth, and he thinks you're greedy. Pay no attention. He simply doesn't understand.”

- Robert G. Allen -

Why Most People Don't Build Wealth

Very few people have a financial plan, even though they know it will help them, because:

1. They don't have enough _____ for it to matter.
2. Creating a _____ is too complicated.

What they don't understand is _____ can be created by doing _____ consistently over time.

6 Steps to Becoming a Wealth Builder

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

A Wealth Plan Is

1. A _____ strategy that can guarantee _____ over time in increments that you never thought was possible.
2. It's a _____ strategy.
3. It provides the _____ and _____ for all of us to _____ life changes, and any sort of _____ crisis.

WEALTH



"Wealth is the ability to fully experience life."

- Henry David Thoreau -

Part One Reflection

This is an important step in the process. Please take some time to reflect and discuss your answers with a peer, friend, coworker, spouse, or accountability partner. Take a moment and write down three financial goals for you or your family.

1. Savings:

2. Income:

3. Retirement:

THOUGHT PROVOKING: What is the scariest thought you have around money? Is it where you are today, or waking up in five or ten years and nothing has changed financially in your world?

Part One Reflection

Part One takeaway(s):

How has money had a negative or positive affect on your life? Your relationships? Your health? Your freedom?

Part One Homework Question

In the "Wealth Series 2.0," I will learn how to move from an _____
_____ to a _____.

Preparation for Part Two

Gather the following items to prepare for the next part of the Wealth Series. Spending the time now will help you get the most out of the upcoming lessons. Don't stress if you can't find everything!

- Recent bank statements
- Most recent credit card statements
- Mortgage statements
- Retirement balances
- Student debt
- Value of personal belongings, like your vintage Air Jordan sneakers

IMPORTANT

Nothing in this course constitutes investment advice, performance data or any recommendation that any security, portfolio of securities, investment product, transaction or investment strategy is suitable for any specific person.

We cannot assess anything about your personal circumstances, your finances, or your goals and objectives, all of which are unique to you, so any opinions or information contained on this course are just that – an opinion or information.

You should not use our advice to make financial decisions and I highly recommend you seek professional advice from someone who is authorized to provide investment advice.



Ben Kohn

Win Make Give Series