

WIN MAKE GIVE



WEALTH SERIES

2.0



PART SIXTEEN
Wealth Series 2.0 Impact

IMPACT



"If you want to be financially free, you need to become a different person than you are today and let go of whatever has held you back in the past."

- Robert Kiyosaki -

Part Sixteen - Wealth Series 2.0 Impact

In the last lesson, we talked with Rich Dad Advisor® Tom Wheelwright about advanced tax strategies that legally reduce the amount of taxes you owe. I highly recommend learning more about this wealth-building strategy and reading his two books, “Tax-Free Wealth” and “The Win-Win Wealth Strategy.”

I know for many of you, this journey has been eye-opening. Over the last several weeks, you’ve made huge strides by clarifying your finances, your retirement goals, and how to chart a path forward that allows you to do what you want, when you want, and with whom you want.

Please take a moment to celebrate how far you’ve come, whether a small step or a giant leap. You move forward only by uncovering your relationship with money and understanding how you spend and save it. All your hard work up to this point is how you begin building wealth for tomorrow and continue on your journey as a student of wealth.

In today’s lesson, we speak with three “Wealth Series 2.0” participants to learn more about their financial journey. We uncover their ‘aha’ moments, mindset shifts, and the actions they are taking now.

Now, get ready to hear how people just like you are applying the lessons they’ve learned to put themselves on a successful wealth-building path.



Ben Kinney

Ben Kinney Companies Founder

WinMakeGive.com

Wealth Series Impact - Interview with Stacy Miller



Stacy Miller

We spoke with Stacy Miller, the top contributor on the *Win Make Give* Facebook group page. If you've been active on the group during the series launch (Jan-Feb 2023), you've most likely seen her words of support and financial wins. Here are a few key points from our interview on how the lessons impacted her life and money mindset.

Stacy's key takeaways:

1. Finances are in my control. I control how much I spend and how much I save.
2. Improving your finances can be done at any stage in life; no matter where you find yourself, anybody can get ahead.

Stacy's action steps:

1. Removed car insurance from an unused vehicle, sold that vehicle to pay off debt, and put the rest into a vacation fund.
2. Cut down on subscriptions like Netflix.
3. Cut down on dining out.
4. Began taking a proactive approach on how she spends money.
Example: If weekend plans include a night out with friends, money is saved and not spent throughout that week.

Take a moment to think about how “Wealth Series 2.0” impacted your money mindset, and write down two action steps you have taken.

Wealth Series Impact - Interview with Gail Smith



Gail Smith

We spoke with Gail Smith, who went on this wealth-building journey with three of her grandchildren (Kelan and Colton are 15 years old, and Ava is 17 years old). Each week they downloaded the workbooks, listened to the podcasts, and then hopped on a call to review the material together. Gail was blown away by their depth of understanding and the pivotal wealth-building steps they made.

Ava sets aside a portion of the money she earns from her job into a savings account, but realized she needed to save more money. She doubled her savings and moved that money into an account with limited access. Another ‘aha’ moment came during the highlighter exercise, which showed Ava she was wasting money while out with friends.

Colton’s goal is to save \$10,000 by the end of the summer and put that money into an index fund. Inspired by the real estate lesson, he wants to buy an owner-occupied investment property to live in and rent out after high school graduation.

Gail’s key takeaways:

1. The lesson steps are simple and easy to follow.
2. It’s easy to see how small changes in your spending and saving create a massive compounding effect over time.
3. Learning the fundamentals of building wealth isn’t just for adults; it’s for kids too!

Write down the names of two (or more) young people in your life that you would like to share “Wealth Series 2.0” with.

Wealth Series Impact - Interview with Ava Channer



Ava Channer

We spoke with Ava Channer, one of our youngest “Wealth Series 2.0” participants. This amazing fifteen-year-old dove into the lessons, posting insightful comments, ‘aha’ moments, and questions on the “Win Make Give” Facebook group page. Here are a few of her takeaways and action steps.

Ava’s key takeaways:

1. Pay more attention to what you buy and take the time to consider the short and long-term impact of that purchase.
2. Investment properties are a fantastic way to build wealth.
3. Think outside the box and don’t be afraid to chart your own path.
4. Save, save, save!

Ava’s action steps:

1. Reading books about building wealth and actively learning more.
2. Using a financial app that automatically sorts money into vaults to make saving easier.
3. Set two goals: save money for a car and an investment property.

What is the key takeaway from your journey with “Wealth Series 2.0?”

Wealth Series Impact - Reflection Questions

How has my mindset changed around money?

What steps am I going to take today to maintain healthy and sustainable financial habits?

Wealth Series Impact - Reflection Questions

What have I already done to maximize my assets? What should my next step be?

What have I already done to reduce my expenses? What should my next step be?

What are my top two wealth-building priorities for the year?

How am I going to actively manage those priorities?

Wealth Series Impact - How Listeners are Taking Action

The *Win Make Give* Facebook group page is hopping with takeaways, action steps, and inspiration. Here are just a few comments when we asked how “Wealth Series 2.0” has changed people’s lives.

“After listening to ‘Wealth Series 2.0,’ my daughter asked me to help her buy her first house as 50/50 partners! She is 18-years-old and a college freshman at Kansas State University studying to be an architect.

A fire was lit, and after three weeks, she went under contract on a four bedroom, two bathroom house, just two blocks from campus. She already found roommates who will pay \$500 each per month, offsetting her \$1,200 monthly mortgage payment and allowing \$300 in surplus while she lives for free for the next five years!

And, because she is owner-occupying, we only needed to put 3% down AND got a better interest rate. At the current return rates, we should recoup our original \$5,100 down payment by 2026!

She plans to reinvest the profits every year into a new purchase, and by the time she is 22 or 23 years old, she should own four properties that are profiting \$800 per month apiece. I wish I knew at her age what we are teaching her today!”

- Liz Ross



Liz Ross

Wealth Series Impact - How Listeners are Taking Action

“If you are older and behind, don't give up. I was there (and still am to a certain degree), but catching up. I have sold real estate for almost 18 years and never had a lot of interest in investing - not sure why. I think I didn't want the hassle of rental properties and possibly did not understand it.

In 2020, while having my best year in real estate, I decided to buy a short-term rental. Prices and rates were good then. Fast forward to 2023, I just closed on my fifth condo in the same complex. Prices and rates have gone up, but there are still good deals. I have paid \$820,000 in total and I could sell for \$1,250,000 today. I will net approximately \$50,000 per year after expenses (payment, HOA, utilities). I don't use the cash flow or lifestyle costs, but instead, put it into an account that goes toward the down payment for my next investment property.

My goal is to get five more units that cash flow \$100,000 for retirement. I am 58 years old and would like to retire before 70. I am more interested in the appreciation and the amount this added to my net worth. In short, it's not too late - just buy something and start. It gets addictive.

Hope this encourages someone. I wish I had started earlier, but it is what it is. Don't compare yourself to others, we all have different journeys. Figure out what you want and make it happen. That's all!”

- Hobie Reber



Hobie Reber

Wealth Series Impact - How Listeners are Taking Action



Kayre Imus

“I feel incredibly inspired after listening to the ‘Wealth Series 2.0!’ I have wanted to work on generational wealth. I have overcome hardships, addiction, and homelessness – and never really thought it would be in the cards for me. We are negotiating through the inspection period of our new family compound, a property with three dwellings and plenty of future income potential! Not to mention the instant equity due to the limited inventory in our area. There are so many possibilities, and we would never have taken this chance without WMG! My lack of assets inspired me to make the leap of faith. Sending positivity, good vibes, and prayers.”

- Kayre Imus



Cheryl Dare-Kerr

“I’m incredibly proud of my accomplishments since listening to the ‘Wealth Series 2.0.’ To name a few:

- 1. I moved more money into a high yield savings account.*
- 2. I opened up a Vanguard S&P 500 account.*
- 3. I cut back on some unnecessary subscriptions.*
- 4. I calculated exactly what I need for retirement, which felt good, and now I’m setting up a consistent plan.”*

- Cheryl Dare-Kerr

DISCUSSION QUESTIONS

What is the biggest impact the “Wealth Series 2.0” has had on us?

IMPACT

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"The goal isn't more money. The goal is living life on your own terms."

- Chris Brogan -

Part Sixteen - Homework Question

“I am in _____ of all of it. I am able to _____ the way I want to _____ . I’m able to _____ every dollar the way I want it to be _____.” Stacy Miller

Preparation for Part Seventeen

- Get ready to join us for the last episode of “Wealth Series 2.0.”
- If you haven’t already, please join the discussion on the [Win Make Give Facebook group](#). Post your thoughts, comments, and takeaways.



Ben Kinney



Bob Stewart



Chad Hyams

**Have you enjoyed your "Wealth Series 2.0" journey?
Leave a review on your favorite podcast platform!**

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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