
Wife2CFO Roadmap





Welcome to Wife2CFO

Created specifically for you. Thoughtfully by me.



After 30 years of listening, understanding and coaching thousands of exceptional women like you, I personally felt the need to create a sanctuary to help you better connect to your money and (re)establish a healthy attitude toward your finances and life goals.

Wife2CFO is a journey. And you're taking the first step now, with me.

We are making a commitment to your confidence and clarity through building knowledge.

The end result is that you will shift from anxiety to excitement, from overwhelm to feeling totally capable of making both big and small money decisions.

Let me be very clear . . .

This is not your husband's money management.

This is not your father's money management.

[This is your unique path to financial freedom.](#)

Together we're going to embark on a path of owning and accepting what is yours and making the right decisions for your future.

The journey begins with this first step. The Wife2CFO Roadmap.

Let's go – together. Shall we?

Yours,

A handwritten signature in black ink that reads "Michelle M. Ann".



1 Vision

Begin by getting clear on why you signed up to download this Wife2CFO Roadmap. You currently feel some combination of overwhelm, confusion, anxiety or... variation on this theme. I recommend that you begin by describing what that feeling is for you, AND how you hope to feel once you've completed this Wife2CFO Roadmap. It really helps down the road when you look back and see how far you've gotten!

How I feel about my future given where my finances are today:

How I'd like to feel about my future if I was more confident around my finances:

Which areas need attention first? Choose 3

- Spending
- Investing
- Bill Paying
- Having the right team
- Debt
- Saving
- Giving
- Making a major life change



2 Get Organized

Okay! Awesome work.

The next essential step to financial peace of mind is knowing where everything is. Time to get organized. Who are the service providers that make your home operate?

MY HOME

Landlord

company _____

contact name _____

address _____

phone _____ email _____

Electrician

company _____

contact name _____

website address _____

phone _____ email _____

Water

company _____

website address/password _____

service phone _____ email _____

Gas-Electric

company _____

website address/password _____

service phone _____ email _____



MY HOME

**Phone-Internet-
Cable-Satellite**

company _____
website address/password _____
service phone _____ email _____

General Maintenance

company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____

HVAC-Boiler

company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____

Landscaper

company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____



MY HOME

Pest Control company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____

Plumber company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____

Roof-Chimney-Gutter company _____
contact name _____
website address _____
phone _____ email _____
frequency of service _____

Trash Service company _____
contact name _____
website address/password _____
phone _____ email _____
frequency of service _____



Now let's organize the data and documents pertaining to your family.

MY FAMILY

My family will feel nourished and cared for when I know I have the following handled:

- 1. _____
- 2. _____
- 3. _____

Parent 1 name _____
 social security number _____
 date of birth _____

Parent 2 name _____
 social security number _____
 date of birth _____

Child 1 name _____
 date of birth _____

Child 2 name _____
 date of birth _____

Child 3 name _____
 date of birth _____

Child 4 name _____
 date of birth _____



MY FAMILY

My Family's Important Documents

This is going to require that we go on a bit of a scavenger hunt, depending on the state of your documents.

Go through the following list, and check off when you've located the document (and strike through it if it's not applicable.)

Now scan them and put in a shared digital folder so that you and your family members can have access to them from anywhere. (You know, it's the cloud. ;-)

When you're done scanning, place all the documents in one place, and indicate where that place is here: _____.

- | | |
|--|---|
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Military Paper |
| <input type="checkbox"/> Business Document-Partnership Agreement 1 | <input type="checkbox"/> Passport |
| <input type="checkbox"/> Business Document-Partnership Agreement 2 | <input type="checkbox"/> Citizenship Paper |
| <input type="checkbox"/> Professional License-Certification-Degree | <input type="checkbox"/> Social Security card |
| <input type="checkbox"/> Marriage Certificate | <input type="checkbox"/> Adoption Certificate |
| <input type="checkbox"/> Pre-Post Nupital Agreement | <input type="checkbox"/> Death Certificate |
| <input type="checkbox"/> Separation-Divorce-Custody Agreement | |

Goals to bring about more confidence and clarity as it pertains to getting organized:

1. _____
2. _____
3. _____



3 The People On My Team

Great! Moving onto the next step.

Next, spend an hour looking up and writing down essential information that will save you so much time and frustration in the future.

MY PROFESSIONAL TEAM

I know I have the right team when:

1. _____
2. _____
3. _____

Caretaker name _____ phone _____
address _____
email _____

Accountant name _____ phone _____
address _____
email _____

Financial Advisor name _____ phone _____
address _____
email _____



MY PROFESSIONAL TEAM

**Family Attorney
Wills & Estate**

name _____ phone _____
address _____
email _____

Divorce Attorney

name _____ phone _____
address _____
email _____

Insurance Agent

name _____ phone _____
address _____
email _____

Physician

name _____ phone _____
address _____
email _____

Dentist

name _____ phone _____
address _____
email _____

Executor

name _____ phone _____
address _____
email _____



MY PROFESSIONAL TEAM

Trustee name _____ phone _____
 address _____
 email _____

Other name _____ phone _____
 address _____
 email _____

Other name _____ phone _____
 address _____
 email _____

Other name _____ phone _____
 address _____
 email _____

Other name _____ phone _____
 address _____
 email _____

Other name _____ phone _____
 address _____
 email _____

4 My Finances

When facing financial details, my first response is:

I would like to work toward a state of mind where working on my finances feels:

To accomplish this, I will focus on doing the following first:



PRO TIP

Replace *'I have a stupid question'* with *'I have a clarification question.'* Immediately feel the difference in your power and energy.

MICHELLE SMITH



MY ACCOUNTS

Bank Account 1 name _____
address _____
title holder _____
acct. type _____ acct. no. _____

Bank Account 2 name _____
address _____
title holder _____
acct. type _____ acct. no. _____

Bank Account 3 name _____
address _____
title holder _____
acct. type _____ acct. no. _____

Credit Card 1 bank name _____
address _____
title holder _____
acct. type _____ acct. no. _____

Credit Card 2 bank name _____
address _____
title holder _____
acct. type _____ acct. no. _____



MY ACCOUNTS

Credit Card 3 bank name address title holder acct. type acct. no.

Home Equity Line of Credit bank name address title holder acct. type acct. no.

Other name phone address email

Other name phone address email



PRO TIP

Send the completed version to your closest family member(s) and/or your most trusted contact(s), so they have this information should the need arise to reference. NOW CELEBRATE – this was a major milestone, and I'm proud of you! MICHELLE SMITH

PS: If you are excited about the prospect of taking the next step, visit Wife2CFO.com/course to learn more about our Design Your Destiny course.