One-on-One Accountability Program with Lena Perepelova

Commitment with a life-long impact:

- ☐ Get full control of your personal finances
- ☐ Design your personal strategy to fit your financial goals
- ☐ Learn what you need to know about investing
- ☐ Make first investing steps in accordance with your strategy
- ☐ Incorporate regular wealth management habits into your life

Which **transformation** can you expect as an outcome of the program?

- ✓ You will feel much more confident around money and financial matters
- ✓ You will change your general attitude towards your personal finance, where wealth management will start feeling like an easy and even pleasant activity
- ✓ You will start dedicating more time to your wealth management
- ✓ With time, you will start seeing clear results in better financial outcomes
- ✓ You may get more clarity around your future career goals, choice of employer, salary negotiations, or defining your pricing as an entrepreneur
- ✓ You may be ready to make new lifestyle choices
- ✓ Finally, you can expect fewer money-related conflicts with your partner

What is the **cost** of the program?
The program is €599 payable in 4 monthly installments of €149,75.

What is the **length** of the program?
The program length is 6 months and we meet on a monthly basis.
You can choose to meet every 2 or 3 weeks and finish in 4 months.

What is the **program workflow?**

Session 1 Introduction meeting:
Evaluate your current situation, establish your goals, create the working plan

We will start with a 90 min session to look through your personal situation* .
We will define very concrete program objectives regarding clear actions and outputs.
We will identify possible gaps in your financial knowledge and establish your learning goals.
* Upon signing into the program, 1-2 weeks before the 1st session, you will receive my Financial Dashboard ™ tool so you can start bringing your finances in order.

Session 2 Wealth strategy - Quantifying your goals

Putting a number may be the most difficult part and that is why we will jump right into it.

- Where you stand today: Depending on how complex your finances are, we will dedicate time to additional work on your personal financial dashboard or any alternative tool, where you can control and monitor your finances long-term.
- Where you want to be in the future: Every personal goal can be quantified and it is easier than you think. In this session we will start working on your financial goals.

Sessions 3-4 Learning about stock market investing.

This is the easiest part of the process. You can be assured that I will teach you all you need to know about stock market investing in the quickest way fully adapted to your current level of knowledge and learning style. If necessary, you will receive additional learning materials for studying at home.

Session 5 Wealth strategy - The document

Now we know what we want and understand which investment alternatives can bring us to our goals. It is time to put our thoughts on paper. In this session we will start working on your investment strategy document. At this stage you may also want to work on setting up your investment account or other practical tasks.

Session 6 Learn to measure profitability in real estate investing

Session 7 Conclusions and results

Can I define my own program objectives or change the program flow?

Yes, you can. The proposed workflow is an example.

What if I am not ready (not willing) to start investing?

If you decide to start investing on your own, we will learn and perform all the required actions (opening an investing account, understanding the products, selecting appropriate products, establishing investing frequency, and learning to operate the platform).
If you decide to find a financial advisor or work with a wealth management department of your bank, you will get my help to evaluate the proposals and make your choices.
Or maybe you just want to understand how somebody else is investing your money….

How much time should I dedicate to the program?

Every situation is different and the amount of work you will put into it will always depend on your final goals and the current state of your financial affairs. If you feel you are behind and really would like to learn, I would think you should try to dedicate 1-2 hours per week.

How to subscribe and when do we start?

Book your first personal consultation here.

Before contracting this product, please read the Legal Disclaimer here.