



12-Week Financial Wellness Reboot

A transformative, research-informed program designed to help individuals and couples rebuild their relationships with money.

This 12-week virtual program blends financial therapy with traditional financial planning and personal finance concepts. Each week focuses on emotional awareness and practical systems to reduce money stress and strengthen financial alignment with your values, goals, lifestyle, and money personality.

Week 1: Expectations, Goals, & The Money Relationship

Week 2: Personal Money Stories & Scripts

Week 3: Triggers & De-Escalation

Week 4: Financial Snapshot

Week 5: Values & The Meaning of Money

Week 6: Roles, Responsibility, & Power

Week 7: Spending Identity, Shame, & Self-Soothing

Week 8: Debt & Financial Stress Repair

Week 9: Investing, Risk, & Future Self

Week 10: Vision & Goal Architecture

Week 11: Money Meetings & System Design

Week 12: Integration, Celebration, & Transition

The program includes the following:

- 12 weekly 60-minute sessions over Zoom
- A complete workbook and worksheet library
- A personalized financial snapshot and analysis
- Communication and conflict scripts rooted in research
- Deep “money story” exploration and values alignment exercises
- A guided framework for debt, saving, investing, and cash flow decisions
- A structured monthly money meeting template and system
- A final transition session with personalized coaching, financial planning, and investment management offerings

Investment: \$3,000 per individual or couple

This program is ideal for individuals and couples who seek better clarity, stability, and freedom in their financial lives!