

TURNING MONEY INTO WEALTH



Wealth Advisers

JasonHowell.com

ABCs of Personal Finance

1. Answer the Elephants

2. Basics Training

3. Capitalizing on your Gifts

- **BONUS:** The 3 Elements of Power

Answer the Elephants



Answer the Elephants

- Who are you financially?
- What do you really want?
- How can money help?

Basics Training



Basics Training

- Emergencies you can afford
- Emergencies you **can't** afford
- Getting right side up

Capitalizing on Gifts



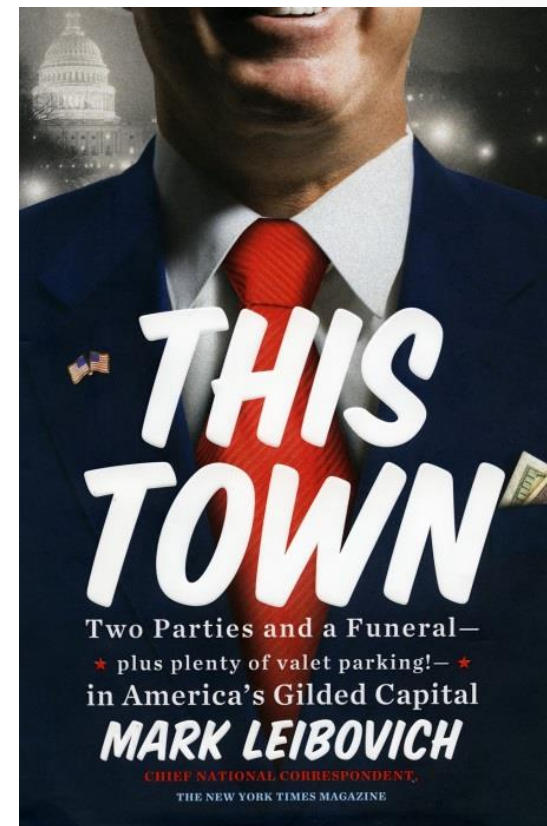
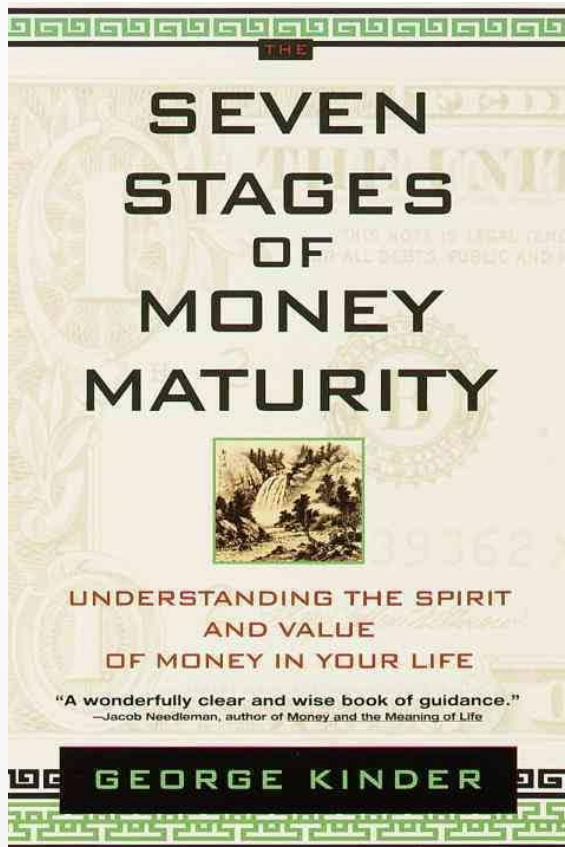
Capitalizing on Gifts

- Your profession
- Our Tax Policy
- The DC Metro Region

7 Parts of Proper Financial Life

1. **Cash Flow** – Net worth, Outflow, Inflow
2. **Debt Flow** – Become “right side up”
3. **Investment Flow** – Beat inflation and move on
4. **Risk Protection** – Use insurance as leverage
5. **Tax Law** – Prepare for taxes before December 31
6. **Estate Plans** – Make plans and document them
7. **Build Teams** – Internal & External (CPA, CFP®, Attorney)

2 Book Recommendations



QUESTIONS





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