



The Financial FastTrack is a unique, seven-stage process designed to guide you through the creation of your ideal life using fundamental economic principles. Each stage introduces new, important ideas that build on previous understanding. You will work with your advisor and/or executive team to complete the Financial FastTrack process over several months. Each stage you will be given the opportunity to read or listen to preliminary materials that describe the principles, exercises and activities in that stage. In addition to this written material, and meetings with your advisor, you will participate in other educational opportunities, including live workshops, web-based seminars, telephone conference calls, and audio CD mentoring. The complete Financial FastTrack experience is structured to teach you the fundamental economic principles through which wealth is achieved, and implement a specific plan to build your own wealth using these principles. The seven stages of The Financial FastTrack are briefly described below.



### **The Path™ – Paving the Road to Prosperity™**

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The first stage of The Financial FastTrack is called “The Path” because it introduces you to the process and principles that will lead you to true financial freedom. The Path will immediately teach you the basis for creating wealth in your life. Together, you and your executive team will establish expectations for the coming months, and outline the uniqueness of the process, experience, and education you are about to embark on. You will explore the difference between producers and consumers, and why your future wealth and happiness hinges on your commitment to always being a producer in your life. Lastly, you will schedule your next meeting with your advisory team, and complete assignments and readings for the upcoming Financial FastTrack stages.



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## **The Soul Purpose Activator™ – Cultivating the Wealth Within™**

Your Soul Purpose™ is a combination of the inborn abilities and passions that identify you as an individual, and provide a natural direction for your most fulfilling life. Most people fail to live their Soul Purpose, because they don't believe this way of life is financially viable, or haven't committed to the introspection necessary to identify it. The second stage of The Financial FastTrack takes you through a set of exercises designed to identify your core values and re-spark the child-like enthusiasm you undoubtedly once felt about your greatest ambitions and dreams.

During The Soul Purpose Activator, your advisory team will explain the economic principles at the very core of value creation. You'll learn how these principles invariably align with the concept of Soul Purpose, and how living the vision you have for your ideal life will provide for your greatest wealth and happiness. You'll leave The Soul Purpose Activator with a head swirling with images for your future, an arm full of exciting, new assignments and readings, and a schedule for your next meeting with your advisory team.

Your advisory team will use your responses to questions posed to you during The Soul Purpose Activator to design your comprehensive Financial FastTrack program. Because your ideal life is unique, the education and financial strategies required to pursue this life are likewise unique. Though certain core economic principles will always be taught in The Financial FastTrack, your own educational experience is not pre-determined. The experience is highly customized around your individual situation.



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## **The Castle and Moat Blueprint™ – The Landscape of Your Life™**

Some think that living an ideal life is reserved for the lucky few. However, the wealth that achieves that life and also is the result of that life, is not accidental, magical, or mystical. That wealth is the result of a conscious, well-understood process of maximizing the efficient use of all your resources.

The third stage of The Financial FastTrack, The Castle and Moat Blueprint, breaks down your complete financial picture into distinct components. You'll learn about Human Life Value, and how the Soul Purpose you identified in the previous stage is related to your ability to produce value for others, which invariably produces wealth for yourself. You'll begin to understand and identify your resources, and analyze your current financial strategies. These resources, and the strategy for their effective use, form your complete financial blueprint – your castle. You'll also learn how protecting that castle with a moat of insurance gives you the ability to focus

on the true source of wealth in your life, without worrying whether you might lose that wealth.

During this stage, you will work with your advisory team to evaluate the individual components of your current financial blueprint. Each strategy and financial product will be assessed for its effectiveness and production, both individually and in coordination with all the other elements of your financial blueprint.



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### **The Protection/Production Continuum™** – *Protecting, Leveraging & Maximizing HLV™*

The fourth stage of The Financial FastTrack takes the concepts you have learned thus far, and applies them by identifying all the resources in your life that can be used to create great wealth without additional cost or risk. Property resources, such as real estate investments, mortgage structure, qualified plans, bank accounts, and stock investments are coordinated to operate most effectively. Additionally, Human Life Value resources, which may have no physical presence in the tangible world but are nonetheless of the most value, are identified and put to use. A few Human Life Value resources include your credit worthiness, your personal reputation and character, and your relationships with highly productive individuals. Principles of risk management are applied to ensure that these resources will remain in place and fully utilized no matter what unforeseen circumstances might occur. In essence you will plan for the best, but be prepared for the worst.

Your Advisory team will utilize a proven financial model to identify your available resources. You will then begin to establish the pieces of your financial blueprint.



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### **The Abundance Accelerator™** – *The Macro-Economic Advantage™*

Education alone is worthless if not coupled with action based on that education. The fifth stage of The Financial FastTrack takes all of the learning and planning done previously, and implements a complete financial map leading to your ideal life. Your executive team and The Accredited Network are made up of experts in each area of your financial blueprint. These expert advisors handle the products and strategies in each respective area of your financial blueprint, while your Financial FastTrack advisor ensures that the process runs smoothly, and handles any questions that may arise during the process.

If you have not yet participated in some of the additional educational opportunities available through The Financial FastTrack, such as webinars, conference call mentoring, and symposiums, you will begin to attend these during The Abundance Accelerator stage.



## **The State of Wealth™ – From Philosophy to Prosperity™**

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The State of Wealth stage of The Financial FastTrack reviews your complete financial blueprint, and outlines the future direction of your education in economic principles. Your comprehensive financial picture from before The Financial FastTrack is compared to what you have achieved through The Financial FastTrack. You will learn about The Macroeconomic Advantage of a well-coordinated financial strategy, and how to continue this path into the future. You will also communicate with your advisor about your experience thus far. Logistical matters are also addressed, such as future contact information and a schedule for ongoing communication with your executive team. Lastly, your advisor will outline a process of ongoing review to establish the fundamental economic principles you have been taught.



## **The Excellence Ethic™ – The Producer's Standard™**

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Often, when our eyes are opened to opportunities we thought previously impossible, even greater visions result from breaking down that initial barrier. The final stage of The Financial FastTrack is an opportunity to expand your vision for your own future, beyond what you achieved during The Financial FastTrack. You will learn about the Five Tracks of Human Life Value, and how nurturing each of these areas of your life will result in greater wealth and happiness for yourself and those you love. You'll also learn about the opportunities for ongoing education through The Freedom FastTrack, and how you can achieve the same level of transformation in the Soul Purpose, Mental, Physical, and Social realms of your life that you have experienced in your Financial life through the Financial FastTrack. You may even have the opportunity to bring the value of your own Soul Purpose to others who are experiencing the Financial FastTrack currently, through partnership programs. The Excellence Ethic will introduce you to additional resources you can use to create a constantly evolving, and constantly growing vision of your life and legacy.

### **What's Next?**

To begin The Financial FastTrack process, you will schedule your first meeting (The Path) with an advisor. Depending on your previous familiarity with The Freedom FastTrack, this meeting might be a short, informal review of the coming months, or might be a formal, sit-down introduction to the complete Financial FastTrack process.

To begin The Financial FastTrack, you will also fill out The Application, which accompanies this Welcome Packet. The Application captures a picture of your financial and philosophical circumstances at this moment in time. It provides your executive team with knowledge about your current understanding of fundamental economic principles, and how you have applied them in your financial life previously. This information is used to design your unique curriculum in The Freedom FastTrack.

Once The Application has been completed and submitted to your advisor, you are officially considered a candidate for the Financial FastTrack. Your advisor will consider your commitment to responsibility, as well as your commitment to be a partner in The Financial FastTrack process, and overall mentality in deciding your acceptance into The Financial FastTrack. When your advisor confirms the time of your Soul Purpose Activator meeting, your acceptance into The Financial FastTrack is confirmed. You will be required to fill out a Snapshot before your next meeting. From that moment forward, your executive team will see you, and treat you, as an equal partner in the education, planning, and execution of your ideal life.

## Glossary

In the Financial FastTrack program, as with all of the Freedom FastTrack programs, you will notice unique phraseology, titles and terms that you may not have heard before, or at least not in this particular context. This glossary is intended to help clear up any confusion you may have about a particular word or phrase as applicable to the Financial FastTrack program. If you come across additional phrases or words that you find confusing, please don't hesitate to ask a Financial FastTrack advisor for clarification.

## Definitions

**Consumer:** Someone who consumes more than they produce.

**Consumer Condition:** A state where an individual or society as a whole is not living in Soul Purpose, but rather buying into falsehoods that keep us from contributing more than we consume.

**Economic Interdependence:** Creating enough ongoing income from resources that allow you to cover basic expenses.

**Executive Team:** A team comprised of expert advisors who will work together to ensure that your plans are correctly implemented.

**Five Tracks of Human Life Value:** The 5 major realms of life including: Financial, Soul Purpose, Mental, Physical, and Social.

**The Freedom FastTrack:** A series of programs and systems that focus on balancing and complementing each of the 5 Tracks with all others, each program lasting about one year. It is through the alignment and nurturing of each Track of life that individuals attain greater wealth, health, and happiness.

**Human Life Value:** Both the recognized and unrecognized value in a person's life, such as ingenuity and ideas that organize and produce property value. Human Life Value exists in people as talent, ability and the willingness to create value for others. Property value is what we can physically see with our eyes, such as real estate, airplanes, cars, computers and other physical/tangible items. Capitalizing on Human Life Value is what makes all property value possible.

**Portfolio Income:** Ongoing cash flow from investments. The term portfolio is used because passive income is a myth. Stewardship is always required (even if there is not daily management or activity).

**Producer:** Someone who creates more value than he or she consumes.

**Soul Purpose:** A combination of the inborn abilities, talents and passions that identifies you as an individual, and provides a natural direction for your most fulfilling life. It is the purpose of your "soul" and your "sole" (or greatest) purpose for being on the Earth. Some people refer to this as your "life mission".

**Super Producer:** Someone who creates more value than he or she consumes by primarily utilizing their Soul Purpose.

## The Financial Optimizer

Are you living your ideal life with regards to your personal finances? Complete the below exercise and go over the results with an advisor to see how you can be more in alignment with your ideal financial life.

On a scale of 1 to 10, select the number that best describes your response to each question:

1. How often do you worry about money?

(1=not at all, 10=completely)

1	2	3	4	5	6	7	8	9	10
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2. Do you feel like your personal finances are productively organized?

(1=always 10=never)

1	2	3	4	5	6	7	8	9	10
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3. Are you being paid for your "Soul Purpose", or for doing what you love to do best?

(1=not at all, 10= all of the time)

1	2	3	4	5	6	7	8	9	10
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4. Do you have enough money generated from portfolio income to cover your expenses, if needed?

(1=0%, 10=100%)

1	2	3	4	5	6	7	8	9	10
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5. What percentage of your income is derived from Soul Purpose?

(1=not at all 10=completely)

1	2	3	4	5	6	7	8	9	10
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6. If you were to lose your ability to generate income today, would you have enough funds available to keep the same lifestyle?

(1=0%, 10=100%)

1	2	3	4	5	6	7	8	9	10
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7. What percentage of your income is invested in your Soul Purpose?

(1=not at all 10=completely)

1	2	3	4	5	6	7	8	9	10
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