TARKENTON FINANCIAL

DISCOVERY JOURNAL

Women, Money, and Power Financial Strategies



TO HELP YOU GET THE MOST OUT OF THIS DISCOVERY JOURNAL, during the seminar presentation there will be some optional participant activities. At any point during the presentation, feel free to make note of any insights you gain that may be useful to you. These insights could be ideas, questions, or even concerns.

At a few points in the seminar presentation, we will stop to give you time to discuss and take notes on particular topics. There is plenty of space in this journal for any notes you wish to take.

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Exercise 1: How do you feel about your financial future?

Exercise 2: What did your parents or other influential adults teach you about money?

Exercise 3: What life events are you currently experiencing?

How are you feeling about it?

What challenges are you experiencing that you were not prepared for?

What life events do you foresee in the future?

Exercise 4: Which of the five financial personalities do you most closely identify with? What qualities do you see in yourself?

Exercise 5: Write down your three most important financial goals.

1.

2.

3.

Exercise 6: Write down your three biggest financial concerns.

1.

2.

3.



TIPS FOR PREPARING TO MEET WITH YOUR FINANCIAL PROFESSIONAL

- Review the five distinct roles financially empowered women are creating today, and note which one you most closely identify with.
- Write down your three biggest concerns regarding your financial future.
- If you're caring for aging parents or anticipate you may need to someday, consider involving them.
- If you're in a relationship and share finance and investing decisions, invite your partner along.
- Finally, ask your financial professional about any factors you may have overlooked that may be relevant and important to address.



CONTACT YOUR FINANCIAL PROFESSIONAL

Consider Allianz Women, Money, and Power® financial strategies and take control of your financial future.
To learn more about overcoming your financial challenges and achieving your financial goals, contact your financial professional today.

How can I help?

To make it easier for those of you who want to start now, please complete this contact form. An insurance professional may contact you. This does not obligate you to anything, but does give us a chance to talk further about your financial situation and how this process could benefit you.

Please respond based on what you learned and considered during this seminar.

1. I would benefit from some further discussion/strategizing on:

- ❑ Life events and challenges
- ❑ The financial personality worksheet
- ❑ How to take the next steps
- ❑ A financial assessment
- ❑ Other _____

_____

_____

2. The thing that concerns me most about this process is:

3. I prefer to be contacted by:

- ❑ Mail
- ❑ Email
- ❑ Phone

4. I would like to schedule an appointment:

- ❑ Within one week
- ❑ Within two weeks
- ❑ In the next month
- ❑ On the following date: _____

_____

NAME

_____

ADDRESS LINE 1

_____

ADDRESS LINE 2

_____

ADDRESS LINE 3

_____

PHONE

_____

EMAIL

Who else could benefit from this kind of information?

_____

NAME

_____

PHONE

When you've completed this form, please drop it off with me before you leave. I'll call you in a few days to follow up.

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