



The Wealth Mindset Blueprint

WELCOME

***TO YOUR DAY ONE
WORKBOOK!***

Welcome to your Workbook!

This workbook is designed to help you apply what you learned today. Take time to reflect and work through each exercise to deepen your understanding and start making tangible progress towards your financial goals.

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Section 1: Understanding the Money Mindset

1. Money Narrative Mapping Exercise

01

Earliest Money Memory: Think back to your childhood. What is the first memory you have involving money? This could be a happy memory, a challenging one, or simply one that stuck with you over time. Write down your thoughts below.

Example: I remember receiving \$5 from my grandmother for doing chores, and feeling so excited to have my own money.

02

Financial Messages from Childhood: What are three financial messages you internalized from childhood? These could be things explicitly said to you or messages you picked up from observing others around you. Example: You can't trust people who have a lot of money.

Section 1: Understanding the Money Mindset

03

Identifying a Limiting Belief : Write down one limiting belief about money that you still carry today. What thoughts or beliefs have held you back from achieving financial security?

Example: I'll never have enough money to retire comfortably.

04

Reframing the Limiting Belief : Now, reframe that limiting belief into an empowering statement that supports your financial growth. Challenge the validity of that belief and replace it with a more positive mindset. Example: I am capable of creating financial security through learning and consistent action.

Section 2: Overcoming Financial Barriers

01

Identifying Financial Barriers: Identify one or more financial barriers that you currently face. These barriers could be mental, emotional, or situational. *Example: I struggle with budgeting because I feel overwhelmed by my expenses.*

02

Steps to Overcome Financial Barriers: Write down specific actions or steps you can take to overcome these financial barriers.

Step 1: Create a monthly budget to track expenses and identify areas to cut back.

Step 2: Set a reminder each week to review my financial progress.

Section 3: Setting Clear Financial Goals

01

Writing SMART Financial Goals: Setting clear goals is essential for financial success. Let's set one SMART financial goal that is Specific, Measurable, Achievable, Relevant, and Time-Bound.
Goal : Invest \$1,000 per month into a diversified portfolio for the next 12 months.

02

Breaking Down Goals into Milestones: Break down your SMART goal into smaller, actionable milestones that will help you stay on track.

Goal Milestones:

Invest \$250 every week to reach the monthly goal.

Set up automatic contributions to a brokerage account.

Research and select a diversified portfolio by the end of the first month.

Review portfolio performance quarterly to ensure alignment with goals.

Section 4: Reflection and Preparation for Day 2

01

Revisit the Money Narrative Mapping exercise and expand on your answers. Take your time reflecting on the memories and beliefs you've uncovered today.

Write down three specific financial goals using the SMART criteria—Specific, Measurable, Achievable, Relevant, and Time-Bound.

Identify another limiting belief you hold about money and reframe it into an empowering statement.

Tomorrow, we'll build on this foundation and dive into actionable strategies to create wealth with confidence. You don't want to miss it!