

# OFFICIAL WORKBOOK

NEW YORK TIMES BESTSELLING AUTHOR

*Lewis Howes*

# MAKE MONEY EASY

CREATE FINANCIAL FREEDOM  
AND LIVE A RICHER LIFE

Make Money Easy: The Official Workbook  
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# INTRODUCTION

Has money been a struggle for you? If you feel anxious, avoidant, or emotionally overwhelmed with your financial situation, now is the time for a change.

That's what this workbook is all about. As a companion to the book, *Make Money Easy*, by Lewis Howes, this workbook will help you put into practice what you learn in the book.

From healing your relationship with money, uncovering your Money Story, discovering your Money Style, and preparing for more money with the 7 Money Habits to Make Money Easy, this workbook is a practical dive into your Money Strategy.

In this workbook, you can expect to find:

- ▶ **Big Takeaway Ideas.** A sentence or two that highlights the big idea of the chapter, helping you to internalize the message at a glance and make it part of your new mindset.
- ▶ **Reflection.** Questions or statements to engage with and ponder. These will draw out deeper insights as you engage with the book.
- ▶ **Action Steps.** This is where you get to work. The book has loads of helpful tools already. Here we pull out some of the best ones and enhance them with a few more.
- ▶ **Bankable Quotes.** Callout quotes that give you pause and make you think. Imagine these as the type of insights you might share on social media.

When you use this workbook along with the book, you'll start to focus on who you are and the unique value you bring to the world. The result—a practical path to a richer life and financial peace.

—The Greatness Team



Chapter One

THE TRUTH ABOUT MONEY

Are you ready to unlock the financial freedom you deserve? It starts with you—your mindset, your unique value, and how you serve the world. Money flows when you align your actions with purpose. If you can master your Money Style, you can transform your relationship with wealth and begin to create lasting clarity and freedom. Let's get started.

Key Takeaways from Chapter 1

- \$ Building more wealth starts with preparing yourself to receive it. This involves cultivating the right mindset and creating opportunities for money to flow into your life.
\$ Shifting your focus to your unique value and how you can serve others invites financial abundance into your life. When you focus on impact rather than what money can give you, your energy naturally attracts more resources.
\$ Your personal growth, mindset, and actions are the ultimate drivers of your financial success. Take ownership of your role in creating wealth.
\$ Understanding your Money Style influences your relationship with finances and impacts how much peace, clarity, and freedom you experience. A healthy perspective on money leads to greater fulfillment.

What other takeaways stood out to you?

Handwriting practice lines consisting of multiple horizontal dotted lines.

# Reflection

**Take a moment to reflect on your initial opinions and biases about money.**

- 1.** Reflect on how money currently makes you feel—does it bring you peace, stress, freedom, or something else?

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- 2.** How do you define financial success, and what role does money play in achieving it? Is your definition of success shaped by personal values or societal expectations?

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- 3.** You read about what money is and what money isn't. But what is money to you? Reflect on whether that belief is empowering or limiting your financial growth.

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- 4.** What are your unique skills and talents? How can you use those talents to create value for others? .

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- 5.** What habits or mindset shifts could help you build a healthier, more peaceful relationship with money? Identify specific changes that align with your long-term goals for clarity, freedom, and abundance.

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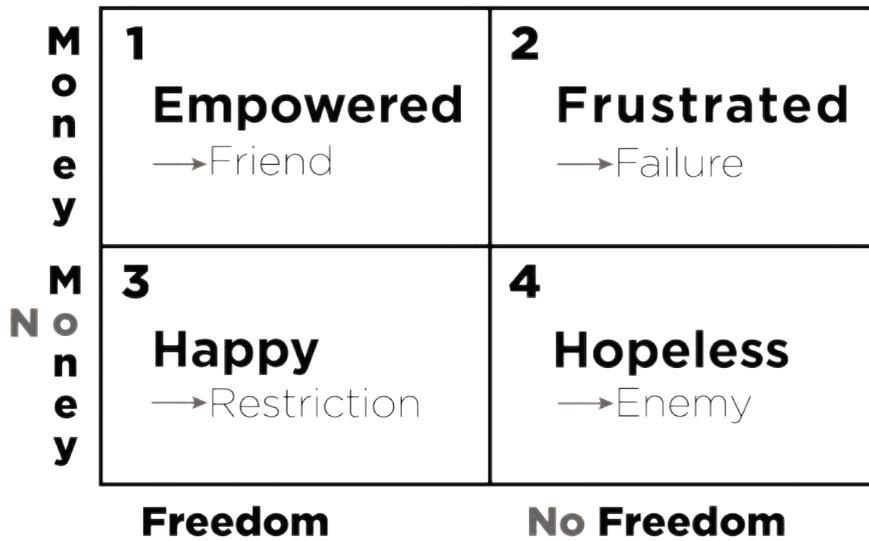
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# Action Steps

Let's start applying what you're learning and break some bad money habits to clear the way for good money habits.

- ▶ **Identify Your Quadrant:** Consider the quadrants of The Financial Freedom Framework. Circle the quadrant you currently identify with.



- ▶ **Your Financial Hopes:** If the goal is to move toward the first quadrant, you'll need to change your mindset and stop viewing money as an enemy, a failure, and a restriction. Dream a bit here.

Write what you hope your finances would look like and feel like if you were able to get to quadrant one and treat money as a friend. Be as specific as possible—what does your bank account look like, what would your lifestyle be like, what would you invest in, and who would you love to help?

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## Chapter Two

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# YOUR MONEY STORY

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It's time to rewrite your Money Story and step into a life of financial confidence. Start by identifying the beliefs and experiences that shaped how you view money. When you become aware of your habits and align them with your true values, you can redefine what wealth means to you and create a life of freedom and purpose. Let's dive in and make every day a rich day.

### Key Takeaways from Chapter 2

-  Your Money Story shapes your financial reality. Your personal beliefs and experiences around money—your Money Story—influence how you perceive, interact with, and manage money.
-  Self-awareness is the key to transformation. To change your financial habits and mindset, you must first become aware of your Money Story.
-  Wealth is personal and subjective. The definition of being rich varies from person to person. Understanding your own meaning of richness allows you to focus on the experiences and values that bring fulfillment, rather than conforming to societal or external standards.
-  Financial freedom is rooted in self-worth and mindset. True financial freedom is more about your relationship with money and your sense of self-worth than the amount of money you have.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on your Money Story.

**1.** Take a look at the Money Lies listed in Chapter 2. Do any of these resonate with you? Identify and circle the top three lies that creep into your life.

- Lack of training
- No resources
- Thinking money is bad
- No time
- Fear of the unknown
- Self-sabotage
- Lack of focus
- Lack of self-worth
- Lack of connections

**2.** Let's go through your Money Story. Reflecting on your early experiences can reveal the roots of your feelings, beliefs, and behaviors around money. Start at the beginning: What lessons about money did you absorb during childhood? How did your parents, guardians, siblings, or friends discuss money?

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**3.** What's your present Money Story? Reflect on your current relationship with money. How does money make you feel? What are your emotions when you save, spend, or make money?

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**4.** What does being rich mean to you? If you could rewrite your Money Story to include a rich life, what does that look like for you?

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# Action Steps

Apply what you're learning about yourself through your Money Story. Remember, it starts with your mindset and how you view your own self-worth.

**▶ Financial Transaction Reactions:** Track your transactions for a week and look for trends. Are you spending to avoid negative feelings? Are there moments when earning brings fulfillment? This helps you understand the emotional roots of your financial behaviors.

Use this chart with two columns: one for financial transactions (e.g., spending, saving, earning) and one for the emotions tied to them (e.g., stress, joy, guilt).

FINANCIAL TRANSACTION	EMOTIONS TIED TO TRANSACTION
<p>Example: <i>Coffee on the way to work</i></p>	<p>Example: <i>Guilt for the high cost of brand-name coffee when I have coffee at home</i></p>

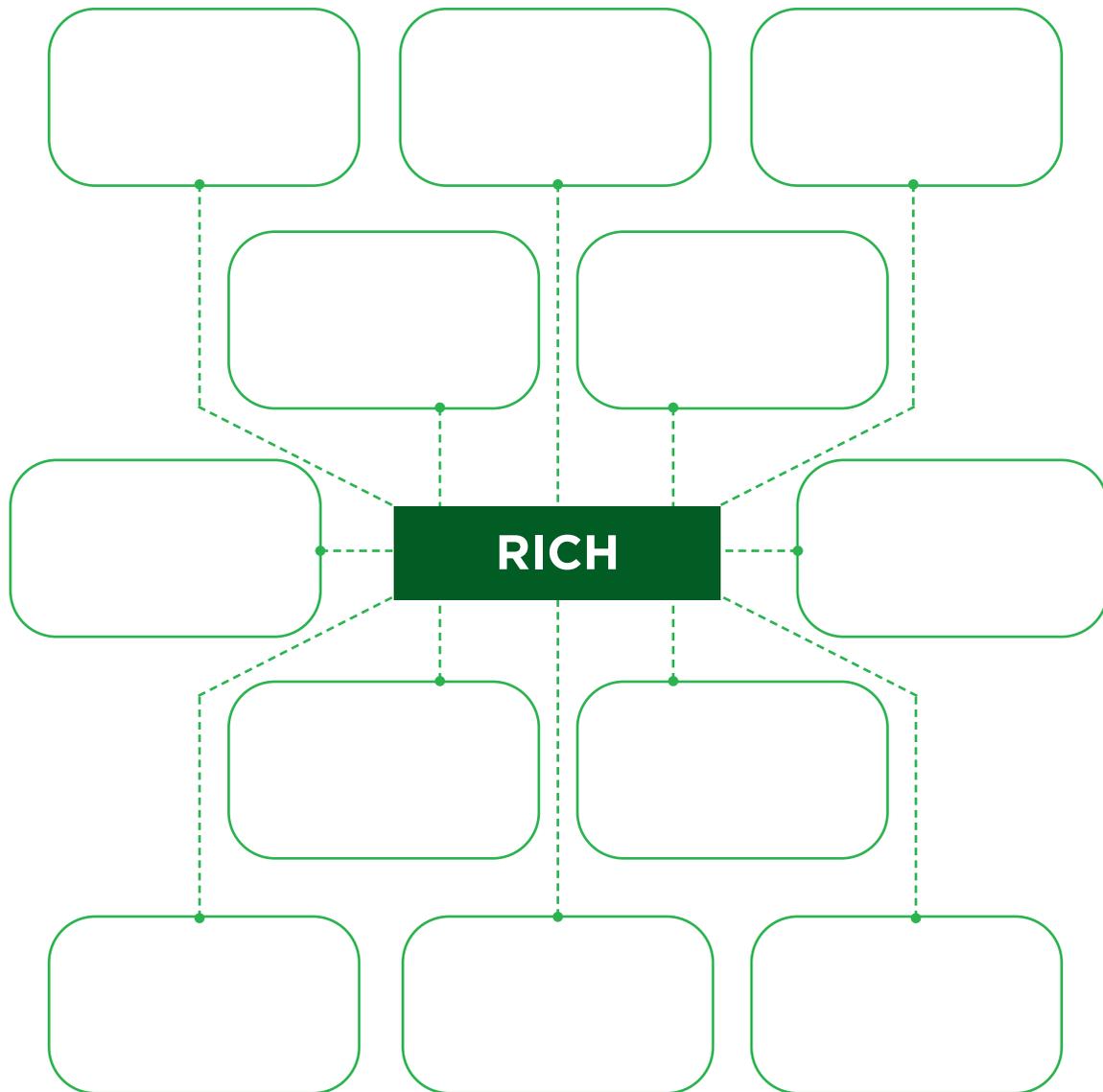
- ▶ **Money Story Timeline:** Use the horizontal timeline below and mark key financial milestones you've had in your life (e.g., first allowance, first job, significant financial struggles or successes). Next to each point, note the emotions and beliefs about money you developed during that time.

## MONEY STORY TIMELINE



**BIRTH**

▶ **Create a Personal Richness Bubble Map:** Brainstorm what richness truly means to you and map those words around the center word “Rich” below. Include financial goals, meaningful experiences, relationships, and personal achievements. This visual exercise helps you define wealth beyond just money and align your actions with your unique vision of a fulfilling life.





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## Chapter Three

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# YOUR MONEY STYLE

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Hit the reset button on your Money Story and take control of your financial future. Start by understanding your natural Money Style and the experiences that have shaped how you think about and manage money. By becoming aware of your strengths, overcoming your shadow tendencies, and aligning your mindset with your meaningful mission, you can create a Money Strategy that supports the life you truly want.

### Key Takeaways from Chapter 3

-  Awareness is the first step toward change. Your Money Style and Money Story shape how you respond to and think about money, but they don't have to define your future.
-  Your Money Style has strengths and weaknesses. It's part of your behavioral DNA and influences your financial habits, but it also has a shadow side that can create barriers to success when overplayed or misaligned with your priorities.
-  Your Money Story multiplies the impact of your style. It is formed by your experiences, beliefs, and choices and shapes how you express your Money Style. This story can align with your natural tendencies, amplify them, or distort them.
-  Resetting your Money Mindset is essential for growth. Creating a new Money Strategy requires healing your relationship with money and aligning it with your Meaningful Mission.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on your Money Style results and how to rewrite your Money Strategy.

**1. State your Money Style: I am a \_\_\_\_\_.**

Reflect on how this style shows up in your life. Where do you see evidence of this style in your financial life?

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**2. State your Money Style Shadow: I can cast a \_\_\_\_\_ Money Shadow.**

Think now about how your shadow style might have surfaced in your life. What type of money situations seem to draw out your shadow?

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**3.** How does the way you currently handle money align with your core values and the vision you have for your future? What changes could you make to better reflect your mission?

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**4.** If you could rewrite your Money Story, what would it look like? What beliefs or behaviors would you leave behind, and what new ones would you adopt to support the life you want to build?

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# Action Steps

Let's start applying what you're learning about your Money Style to move forward with a stronger Money Strategy.

- ▶ **Dig into your Money Style and Shadow:** First, state your Money Style and Money Shadow. Then, list the strengths of your Money Style. Finally, next to each listed point, write the potential shadows of each strength when overplayed.

MONEY STYLE STRENGTH	MONEY SHADOW
Example: <i>Planner</i>	Example: <i>Over Controlling</i>

**▶ State Your Goals:** List ten financial goals that align with your Meaningful Mission. For each goal, write your next step and set a future date to track your progress and milestones.

FINANCIAL GOALS	NEXT STEP TO TAKE	DATE TO TRACK MILESTONES
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



## Bankable Quotes

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**“Neither your style nor your story determines your future strategy.”**

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**“You are not merely the product of your style and story. You can change. And when you do, you can decide for yourself what your Money Strategy will be as part of who you choose to become.”**

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**“Being You can create a new Money Strategy that better aligns with who you want to become.”**

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**“You need to take ownership of your mindset to begin your money reset.”**

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Chapter Four

HEAL YOUR RELATIONSHIP WITH MONEY

It's time to change the way you see and feel about money. Your relationship with money is more personal than you might think—it's shaped by your experiences, habits, and even your emotions. If you've been stuck in a cycle of stress or scarcity, don't worry, you're not alone. By healing your money wounds, understanding your money triggers, and shifting your mindset to one of abundance, you can create a healthier, more confident approach to money that works for you and supports the life you really want.

Key Takeaways from Chapter 4

- \$ Everyone has a relationship with money, whether they realize it or not. By avoiding or feeling uncomfortable addressing money, we perpetuate unhealthy patterns that keep us stuck in cycles of lack and insecurity.
\$ Money trauma can deeply shape our self-worth, confidence, and identity. To break free, we must confront and heal these wounds by replacing anger and shame with self-acceptance, forgiveness, and a focus on meaningful goals that align with our values.
\$ Your mindset and emotional energy impact how money flows in your life. A mindset rooted in scarcity attracts more lack, while healing your relationship with money and fostering a positive outlook opens the door to abundance.
\$ A secure relationship with money starts with security within yourself. This means identifying triggers, setting healthy boundaries, and practicing confidence.

What other takeaways stood out to you?

Five horizontal dotted lines for writing notes.

# Reflection

**Take a moment to reflect on your relationship with money and the healing journey you're about to take.**

- 1.** How has your family and upbringing influenced the way you think about and handle money? Think about the messages you've received about money—whether spoken or unspoken—and how they may have shaped your beliefs, habits, or fears around it.

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- 2.** What past experiences or money traumas have influenced your mindset about money? How did those impact your sense of self-worth or confidence?

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- 3.** What are your biggest money triggers, and how do you react when those feelings surface? Identify specific situations that make you feel stressed around money.

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- 4.** How do you currently view abundance versus lack, and do you find yourself stuck in a mindset of scarcity? Ask yourself: are you focusing on what you don't have, or are you opening yourself up to the possibility of attracting more?

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- 5.** How often do you feel gratitude for the money you have? Take some time now to state how thankful you are for what you do have.

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# Action Steps

Healing a relationship is a lot about self-awareness and mindset work. These action steps will get your brain ready to break some bad money habits to clear the way for good money habits.

**▶ Daily Money Gratitude:** Start a daily practice of writing down five things you're thankful for about money. This could include the opportunities money has provided or even small purchases that bring you joy. Over time, this practice can help shift your mindset toward abundance and appreciation. Start here with your first five items here:

Example: *I'm grateful that I'm able to pay the bills that are due this week.*

1. ....

2. ....

3. ....

4. ....

5. ....

**▶ Energy Shift Practice:** Spend a few minutes each day visualizing yourself in a healthy, abundant relationship with money. Imagine feeling confident, secure, and grateful as money flows easily into your life. Pair this with affirmations like "I am worthy of financial abundance" or "I welcome money into my life with gratitude." This can help you align your energy with abundance and reframe how you approach money.



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## Chapter Five

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# MONEY AND YOUR MEANINGFUL MISSION

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When you connect money to a Meaningful Mission that truly matters to you, it becomes a powerful force to bring your vision to life. By embracing the idea that making money can align with your purpose, you'll not only fuel your dreams but also empower others and create a meaningful impact. Let's reimagine what's possible and make your mission come alive.

### Key Takeaways from Chapter 5

-  Money is not a reflection of your character. It's an amplifier, revealing who you already are and your ability to create positive change in the world.
-  A mission becomes truly impactful when it is deeply personal, and money can serve as a powerful tool to bring that Meaningful Mission to life.
-  There is nothing wrong with making money in pursuit of your Meaningful Mission. In fact, it can multiply your ability to fulfill it while aligning your passions with purpose.
-  When your mission empowers others, it generates renewable energy within you, fueling both your personal growth and the positive impact you create.

**What other takeaways stood out to you?**

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# Reflection

**Take a moment to reflect on your purpose and mission in your life.  
Then, consider how money can amplify your goals.**

**1.** Do you believe it's possible to pursue both purpose and profit? Why or why not?

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**2.** If money were no obstacle, where would you dedicate your time and energy?

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**3.** Let's zero in on your vision. What is your personal purpose or Meaningful Mission in life?

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**4.** How could money act as a tool to amplify and support that Meaningful Mission?

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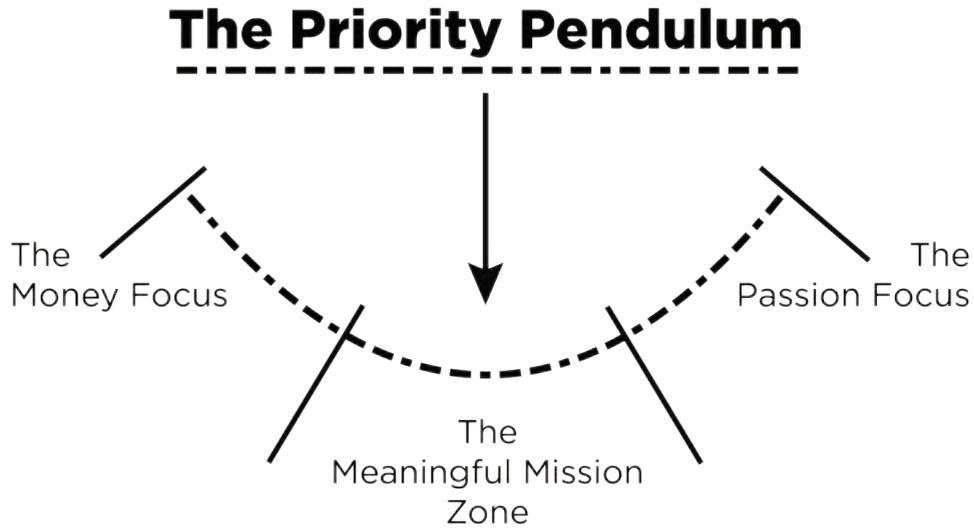
**5.** What fears or limiting beliefs do you hold about earning or using money to pursue a meaningful goal?

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# Action Steps

Start taking applicable steps toward achieving your meaningful mission.

- ▶ **The Priority Pendulum:** Let's identify where you are on The Priority Pendulum. Where do you think you land in the pendulum swing? Are you money-focused? Passion-focused? Or are you in the Meaningful Mission Zone? Self-reflect and identify where you land on the image below.



- ▶ **Your Mission and Money Alignment Plan:** It's time to define your personal mission and map out how money can support it.

**Start by writing down your core values, passions, and one goal.**

**My core values are:**

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**My passions are:**

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**My passions are:**

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**My goal is to:**

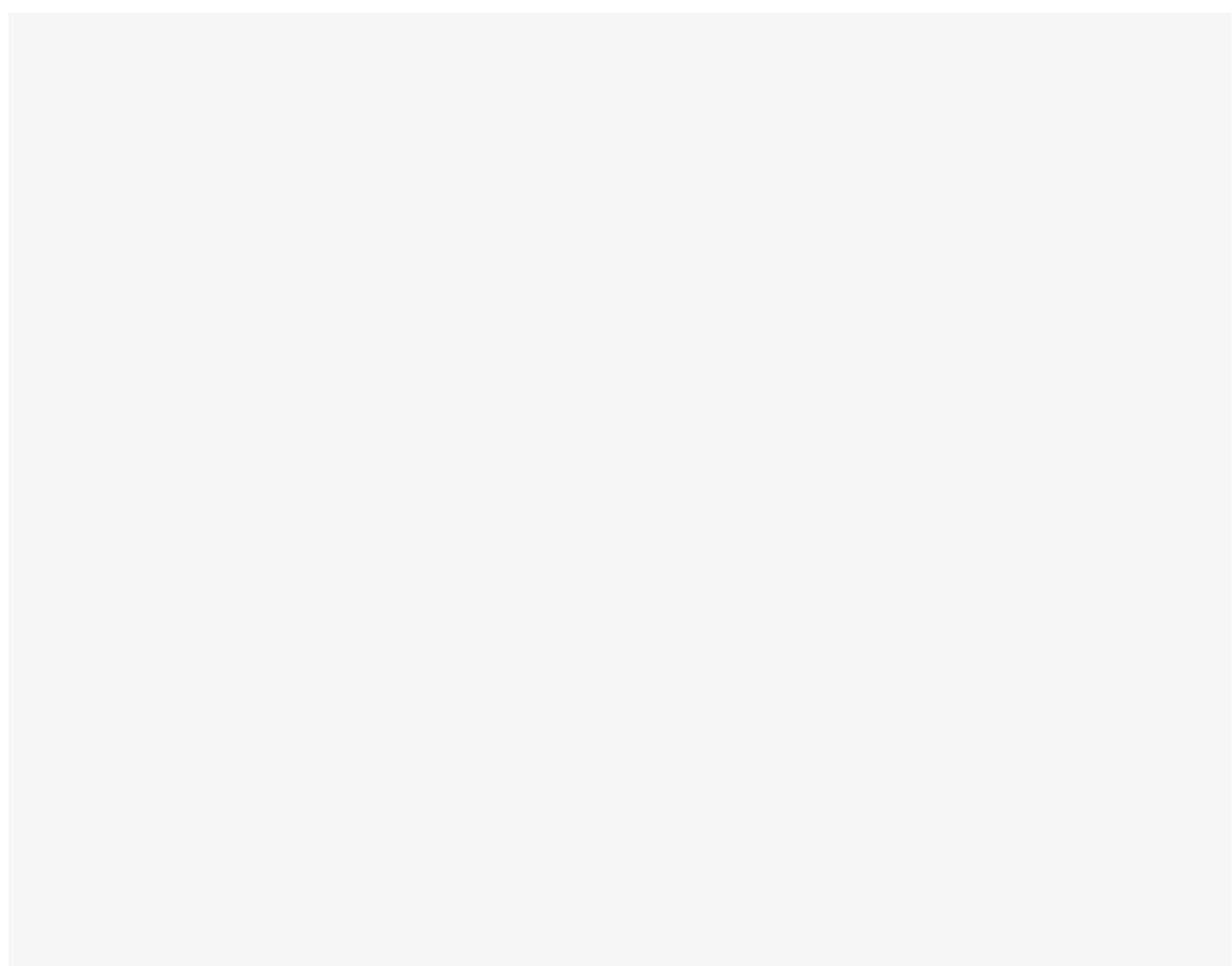
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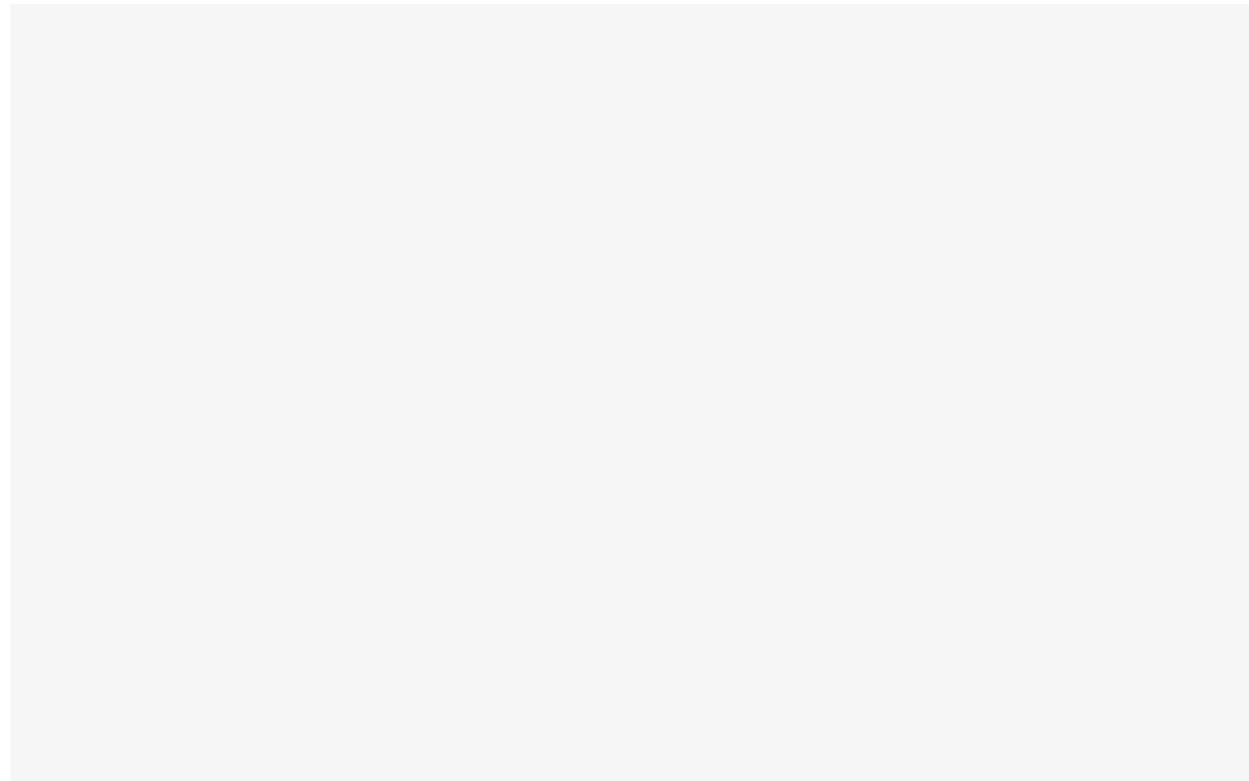
**MISSION IS:**



**Next, identify what resources are needed to bring your mission to life.**

Example: *My mission is to help others find avenues to higher education. The resources I need are companies willing to offer scholarships to local students.*

**THE RESOURCES I NEED TO FULFILL MY MISSION ARE:**



**NOTES**



**Finally, plan out five actionable financial steps that you can take right now.**

Example: *Save \$200 every paycheck.*

Example: *Start making coffee at home instead of buying a cup at the cafe every morning.*

**Five financial steps I can take right now are:**

1. ....
2. ....
3. ....
4. ....
5. ....



## **Bankable Quotes**

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**“Money can make your Meaningful Mission come alive.”**

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**“It is okay to make money in pursuit of your mission.”**

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**“When you create a Meaningful Mission that empowers others,  
it becomes renewable energy for yourself.”**

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*Chapter Six*

**HABIT 1: THE MINDSET HABIT**

A life of abundance starts with two powerful forces: gratitude and generosity. When you align your mindset with these principles, you unlock the flow of prosperity and create opportunities for lasting success. Giving with authenticity and staying open to new possibilities not only transforms your relationship with money but also enriches every area of your life. Start to think about your mindset habits now.

**Key Takeaways from Chapter 6**

- \$** Gratitude opens the door to abundance, while generosity is the action that brings it to life.
- \$** True generosity should feel authentic and aligned with your values and identity. Giving out of pressure or obligation will feel draining, but giving from a place of gratitude and purpose leads to joy and fulfillment.
- \$** By practicing generosity with your money, time, and skills, you build a lifestyle of abundance. Without this foundation, even financial success can feel empty and unsatisfying.
- \$** A mindset of curiosity and courage allows you to explore multiple paths to wealth, from side gigs to investments. Staying open and playful helps you embrace abundance and take the risks necessary to create value and achieve financial growth.

**What other takeaways stood out to you?**

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# Reflection

**Take a moment to reflect on your Mindset Habit, especially when it comes to your generosity and gratitude.**

**1.** How do you currently express gratitude in your daily life?

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**2.** When you give—whether it’s your money, time, or skills—do you feel authentic and aligned with your values? Or do you give out of obligation, expectation, or pressure?

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**3.** What fears or beliefs might be holding you back from being more generous with your resources?

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**4.** What is your experience with exploring new and unconventional ways to create wealth? Do you have any side gigs, investments, or collaborative opportunities?

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**5.** What specific habits could you adopt to align with a generosity and gratitude mindset?

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# Action Steps

Let's start applying what you're learning about generosity and gratitude into your life today.

**▶ Daily Gratitude Journal:** Set aside 5-10 minutes each day to write down ten things you're grateful for. Reflect not only on what you have but also on the people, opportunities, and lessons that have brought value to your life. This practice trains your mind to focus on abundance and attracts more of it. Start here with your first ten things:

- |         |          |
|---------|----------|
| 1. .... | 6. ....  |
| 2. .... | 7. ....  |
| 3. .... | 8. ....  |
| 4. .... | 9. ....  |
| 5. .... | 10. .... |

**▶ Generosity Alignment Log:** Before making a decision to give or contribute, pause and ask yourself: *Does this feel authentic and aligned with who I am?* Log your responses so you can visually see your alignment. Consider making when giving feels good and when it feels forced, so you can better align your generosity with your values and purpose:

ACT OF GENEROSITY	DATE	EMOTIONAL RESPONSE





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## Chapter Seven

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# HABIT 2: THE MAPPING HABIT

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Take charge of your financial future by getting clear on what a rich life means to you. To do this, you'll need to define your unique vision of abundance and create a plan to move forward with purpose. By developing your Mapping Habit, you can open the door to new opportunities and true prosperity.

### Key Takeaways from Chapter 7

- \$** Beyond just money, you must define what a rich life means to you by understanding your unique goals, values, and desires. Without clarity, you risk wasting time on distractions that don't contribute to your growth or service to others.
- \$** Once you've envisioned your rich life, it's crucial to map out actionable steps to achieve it. Without a plan, you may fall into old habits or patterns that limit progress and keep you from moving forward.
- \$** Living a richer life doesn't always mean spending more money. When you shift your mindset and decouple abundance from materialism, you can unlock new opportunities for fulfillment and growth.
- \$** True abundance begins with building a rich relationship with yourself, addressing past wounds, and cultivating healthy habits around money. Only through this healing process can you flourish and truly experience a sense of prosperity.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on how you visualize, plan, and execute on your goals.  
What is your Mapping Habit like?

**1.** What does a rich life mean to you personally?

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**2.** Are there specific distractions or habits that keep you from creating and sticking to a financial plan?

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**3.** In what ways have you connected the idea of living richly with spending money?

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**4.** Have you taken the time to map out your financial future? If not, what specific steps can you take today to create a clear plan? (Ex. defining goals, doing the math, or brainstorming income ideas)

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# Action Steps

Let's start applying what you're learning about your Mapping Habit and move that needle toward reaching your financial goals.

-  **Practice Abundance Beyond Spending:** For one week, challenge yourself to find one act of abundance each day—without any spending money. This could include connecting with loved ones, enjoying free community events, learning a new skill online, or practicing gratitude for what you already have. Reflect at the end of the week on how these activities enriched your life and shifted your perspective on abundance.

WEEK DAY	ACT OF ABUNDANCE	END OF WEEK REFLECTION
MONDAY		
TUESDAY		
WEDNESDAY		
THURSDAY		
FRIDAY		
SATURDAY		
SUNDAY		

**▶ Your Money Moves Checklist:** Take your answers from the Money Moves Map and fill in this chart to help track a financial goal that you'd like to achieve.

QUESTION	ANSWER	NEXT STEP I NEED TO TAKE	DATE TO COMPLETE	CHECK DONE
How much do I want to make?				<input type="checkbox"/>
What fears do I need to overcome?				<input type="checkbox"/>
What do I need to learn?				<input type="checkbox"/>
With whom do I need to connect?				<input type="checkbox"/>
What skills do I need to master?				<input type="checkbox"/>



## Bankable Quotes

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**“Take the time to understand what a rich life means to you.”**

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**“If you never map out your future, you’ll tend to retrace your past.”**

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**“When we disconnect the idea of living a richer life from spending money, we open new possibilities.”**

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## Chapter Eight

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# HABIT 3: THE MONETIZING HABIT

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It's time to unlock your potential by recognizing and sharing the unique value you bring to the world. To do this, you must embrace your self-worth. How do you do this? By taking action despite fear and believing in your ability to overcome challenges. Let's start by acknowledging your value, right now.

### Key Takeaways from Chapter 8

- 💰 The money you make is directly tied to the value you bring to others and your ability to package, sell, and scale that value effectively.
- 💰 You are inherently worthy, loved, and enough, but fully embracing this truth often requires intentional work to overcome fear and self-doubt.
- 💰 Waiting for perfection will only hold you back—confidence grows as you take action, learn from failure, and use what you learn to try again.
- 💰 Value starts with self-worth. People will value you only as much as you value yourself. Investing in your self-worth and cultivating a growth mindset allows you to recognize, develop, and share your unique value, creating opportunities for success and impact.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on your value and self-worth.

**1.** What stories or beliefs about your value have you carried from childhood?

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**2.** How are you measuring your value currently? Are there areas in your life where you might be undervaluing yourself?

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**3.** Are there people in your life who reflect your worth back to you positively or negatively?

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**4.** What unique skills, talents, or experiences do you have that bring value to others?

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**5.** In what ways do you allow fear or the pursuit of perfection to stop you from taking action?

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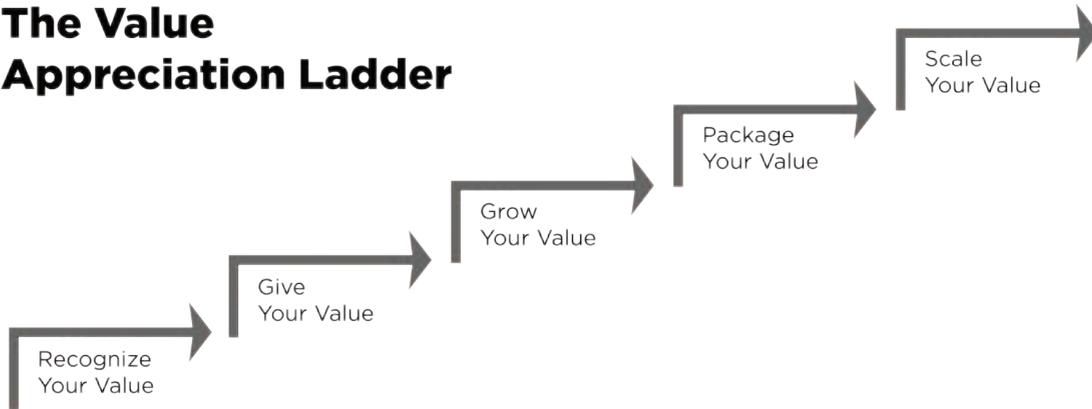
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# Action Steps

Let's start applying what you're learning about your value and break some bad money habits to clear the way for good money habits.

- ▶ **The Value Appreciation Ladder:** Evaluate your current status on the Monetizing Habit. Place an X on where you think you would land on the ladder.

## The Value Appreciation Ladder



- ▶ **Value Inventory Exercise:** List your unique skills, talents, and experiences that bring value to others. For each item, write one practical way you could use it to solve a problem, help someone, or create income.

MY UNIQUE SKILL, TALENT, OR EXPERIENCE	HOW I CAN APPLY IT
<p>Example: <i>I'm very organized.</i></p>	<p>Example: <i>I can start a side hustle of helping people in my town organize their junk closets.</i></p>

**▶ Invest in Growth:** Identify one area where you'd like to grow your value—such as a skill, knowledge base, or confidence—and commit to an investment in that area. This could be taking a course, reading a book, attending a workshop, or even seeking a mentor to guide you.

I'd like to grow in this area: \_\_\_\_\_

I will invest in this idea by doing this: \_\_\_\_\_

I will start investing in that area on this date: \_\_\_\_\_

In three months, I will check on my growth progress.

Three months from my start date is: \_\_\_\_\_

Now make sure to come back and reflect on your growth in three months.

After three months, I have grown in this area by:

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## Bankable Quotes

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**“The amount of money you make is directly related to the amount of value you bring to others and your ability to package and sell that value.”**

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**“People tend to value us only as much as we value ourselves.”**

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**“The thing that stops most people from appreciating their value is quite simple: fear.”**

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**“Self-doubt is the killer of dreams.”**

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## Chapter Nine

# HABIT 4: THE MASTERMIND HABIT

Ready to strengthen your relationships and unlock the incredible opportunities they can bring? By approaching relationships with intention, gratitude, and service, you'll surround yourself with people who inspire growth. Let's start creating meaningful connections today.

### Key Takeaways from Chapter 9

-  Authentic connections are built by asking what you can do for others, not what they can do for you.
-  While connections can help grow your wealth, people are far more valuable than money. Prioritizing authentic service and reliability in your relationships creates long-term trust and mutual benefit.
-  The same habits that create a healthy relationship with money—gratitude, intentionality, and balance—can also be applied to relationships with people, leading to impacts in both areas.
-  Engage with mentors and a network that can help you grow your mindset around wealth and success. Observe their habits and learn how to have intentional conversations about money and vision to align your relationships with your goals.

**What other takeaways stood out to you?**

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# Reflection

**Take a moment to reflect on the relationships you have in your life and how those people have brought you to where you are now.**

- 1.** When you think about the most meaningful relationships you've built in the past, what made them successful? How did you contribute to their growth and value?

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- 2.** Have there been times in your past when you prioritized what you could gain over what you could give in a relationship?

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- 3.** Are there any habits or tendencies—like flakiness or lack of follow-through—that might be holding you back from building trust and authenticity in your relationships?

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- 4.** How do you currently express gratitude in your relationships?

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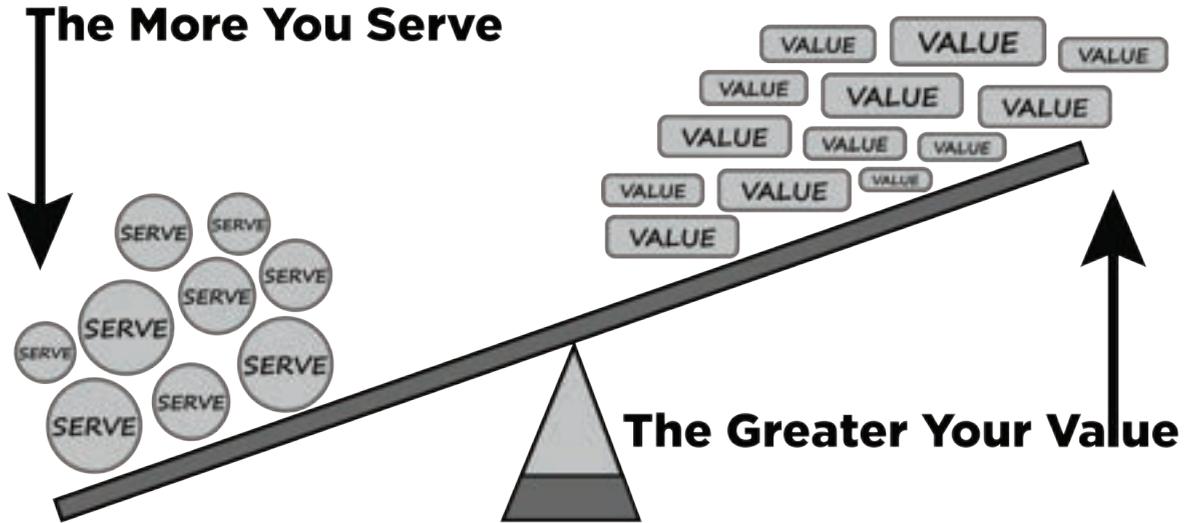
- 5.** Shift your mindset to focus on what you can do for your connections rather than what they can do for you. What value can you bring to the people in your network?

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# Action Steps

Let's start applying what you're learning about relationships to really build authenticity and trust.

**The Service-to-Value Lever:** Think about how this lever applies to your life.



**Choose which applies to you:**

- A. My lever is heavy on the serve side.
- B. My lever is light on the serve side.
- C. My lever is neutral.

**Brainstorm some ways in which you can increase service to your relationships.**

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**▶ Service-First Connection Building:** Identify three people in your network and think about ways you can serve them without expecting anything in return. This could be offering advice, introducing them to someone who can help, or simply checking in to see how they're doing. Focus on adding value to their lives.

PERSON I CAN SERVE	HOW I CAN SERVE	DATE I CAN SERVE	CHECK DONE
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

**▶ Gratitude Outreach:** Take time to thank people who have positively impacted your life or career. Send a handwritten note, an email, or a thoughtful message expressing your appreciation. Notice how gratitude deepens your connections and strengthens bonds. Pick a person and write a rough draft of your thank you note here.

Dear \_\_\_\_\_,

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## Bankable Quotes

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**“I asked not what my connections could do for me, but what I could do for my connections.”**

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**“Start by making real connections with people through authentic service.”**

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## Chapter Ten

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# HABIT 5: THE MAGNETIC HABIT

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Want to inspire others to join your vision and multiply your impact? To do this, you have to serve others and create win-win relationships built on mutual value and trust. You'll need to consistently show up with authenticity, energy, and intention while being patient and willing to align your goals with theirs. Let's dive into how you can master the art of enrollment and bring others on board with your mission.

### Key Takeaways from Chapter 10

- 💰 Successful enrollment involves creating win-win relationships. Focus on how you can serve others and align your vision with theirs, rather than centering the conversation on yourself.
- 💰 Enrollment is an ongoing process. It's not a one-time event. It requires patience, consistent follow-up, and a commitment to building mutually beneficial relationships over time.
- 💰 Your attitude and energy play a key role in enrollment success. Each interaction either builds trust and respect or pushes others away.
- 💰 Naturally, not everyone will be enrolled in your vision, and forcing alignment can lead to toxic relationships. Focus instead on those who genuinely connect with your mission. They'll be the ones who multiply your impact.

**What other takeaways stood out to you?**

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# Reflection

**Take a moment to reflect on how you share your vision and enroll others.**

**1.** How do you currently approach conversations when trying to enroll others in your vision?

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**2.** Think about a time when you struggled to enroll someone in your vision. When someone doesn't align with your vision, how do you typically handle it?

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**3.** Now, think about a time when someone successfully enrolled you in their vision. What made their approach effective?

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**4.** Are there people in your life or network whom you've overlooked as potential collaborators or supporters? How can you engage with them in an authentic way to explore shared goals?

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**5.** Are you prioritizing consistent follow-up in your relationships, or are you treating enrollment as a one-time event? What systems or habits could you put in place to ensure you nurture long-term connections?

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# Action Steps

Let's start applying what you're learning about casting vision and enrolling others into your mission.

**▶ Alignment Check-In:** List five of your current relationships and assess which ones feel aligned with your mission. Write out your mission, their mission, and check whether your missions are aligned. This visual tool helps clarify alignment and encourages win-win thinking.

PARTNERSHIP NAME	YOUR MISSION	YOUR PARTNER'S MISSION	CHECK: ALIGNED
			<input type="checkbox"/> YES <input type="checkbox"/> No
			<input type="checkbox"/> YES <input type="checkbox"/> No
			<input type="checkbox"/> YES <input type="checkbox"/> No
			<input type="checkbox"/> YES <input type="checkbox"/> No
			<input type="checkbox"/> YES <input type="checkbox"/> No

Focus your energy on strengthening connections with those who support and elevate your vision, and consider gracefully letting go of relationships that aren't a good fit.

**▶ 30-Day Relationship Challenge:** Set a 30-day challenge to engage with a new person in your network each day. 30 days, 30 new people, 30 connections made. Focus on how you can offer value to them, whether through sharing resources, making introductions, or providing support. Track your progress to see how intentional connection fosters growth.

NAME	DATE	MY REFLECTION ON OUR CONNECTION
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

NAME	DATE	MY REFLECTION ON OUR CONNECTION
16.		
17.		
18.		
19.		
20.		
21.		
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## Chapter Eleven

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# HABIT 6: THE MOBILITY HABIT

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A thriving business starts with one game-changing habit: delegation. When you learn to let go and empower others, you open the door to incredible growth, more freedom, and bigger results. Delegation isn't just about offloading tasks; it's about building trust, unleashing your team's potential, and scaling your vision to new heights. The best part? You don't have to do it all alone. Start shifting your mindset today, and watch your business soar.

### Key Takeaways from Chapter 11

- \$** If you want your business to grow, you've got to delegate. Trying to do everything yourself holds your business back and creates a cycle where it depends too much on you.
- \$** Delegation isn't just about handing off tasks—it's about building trust, developing emotional intelligence, and giving your team the tools they need to succeed. When they thrive, so does your business.
- \$** A lot of entrepreneurs struggle to give up control, which leads to micromanaging and frustration. Learning to delegate the right way reduces stress, boosts your team's confidence, and frees you up to focus on bigger priorities.
- \$** When your team has a culture of smart delegation, everyone works better together. Clear goals, strong communication, and trust in each other make it easier to handle challenges and hit your targets.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on the bigger questions about The Mobility Habit.

**1.** Can you recall a time when you tried to handle everything yourself, and it led to burnout or missed opportunities?

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**2.** Have there been moments when you delegated a task, and it didn't go as planned? What lessons did you learn, and how could you approach delegation differently now?

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**3.** How much of your daily workload could be handed off to someone else, and what's holding you back from delegating those tasks?

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**4.** How well are you equipping your team to succeed? Are you providing the tools, resources, and clarity they need to deliver their best work?

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**5.** Do you trust your team to take ownership of their roles, and if not, what steps can you take to build that trust?

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## Action Steps

Let's start applying what you're learning and break some bad money habits to clear the way for good money habits.

- ▶ **What's on Your Plate? Brainstorm:** Write down every task or responsibility you handle in your business, no matter how big or small. But think critically about those tasks and where they go on your plate: tasks only you can do, tasks you could delegate with training, or tasks to delegate immediately.



- ▶ **Strengths Mapping Conversation:** Schedule one-on-one conversations to ask about your team members' passions, what they feel they excel at, and where they want to grow. Use this information to match responsibilities to the right people and give them ownership of tasks aligned with their abilities.

- ▶ **The Delegation Challenge:** Choose three tasks you've been holding onto and delegate them to team members over the next week. Provide clear instructions and set expectations, but step back and give them space to own the work. At the end of the week, reflect on how the delegation went—what worked, what didn't, and how it felt to let go.

TASK	DELEGATED TO...	BECAUSE...
Example: <i>Creating a website page</i>	<i>Mike</i>	<i>He did an amazing job setting up the landing page for a product last month.</i>



## Bankable Quotes

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**“Like any healthy child, a healthy business needs to grow. And for that to happen, eventually you need to get out of the way.”**

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**“You need others to do truly great things.”**

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**“When you mobilize your team, you unlock their greatest potential.”**

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## Chapter Twelve

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# HABIT 7: THE MASTERY HABIT

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Want to master your financial future? By committing to learning about money and approaching it with curiosity and positivity, you'll not only grow your confidence but also inspire those around you to do the same. Let's explore how you can master your relationship with money and create the financial freedom you deserve.

### Key Takeaways from Chapter 12

-  Most of us were never really taught how to handle money, which is why so many people feel stuck or stressed about it. Financial literacy is the key to creating financial peace and freedom in your life.
-  If you've got negative feelings or fear around money, it's time to flip the script. When you start approaching money with curiosity and positivity, things can really start to open up for you—both mentally and financially.
-  Getting good with money doesn't happen overnight, but the more you study, research, and share what you're learning, the more confident and capable you'll feel. Plus, you'll inspire others to have better conversations about money too.
-  Forget the old-school myths like needing a degree to get rich or thinking a savings account is enough of an investment. Instead, focus on habits that actually work: pay yourself first, manage your expenses, make your money grow, and keep learning so you can keep earning.

**What other takeaways stood out to you?**

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# Reflection

Take a moment to reflect on your continuous learning habits and financial literacy.

**1.** How comfortable are you talking about money with others? Do you have someone to talk to openly and honestly about the state of your finances right now?

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**2.** Have you ever avoided learning about money? What feeling do you get when you think about managing money and investing?

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**3.** How often do you take time to review your finances and apply what you've learned to your personal situation? Reflect on whether you're actively turning knowledge into action or simply absorbing information without implementing it.

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**4.** When was the last time you intentionally invested time or energy into improving your financial knowledge?

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**5.** What's one area of personal finance—like budgeting, investing, or saving—that you feel least confident about, and how can you start building your knowledge there?

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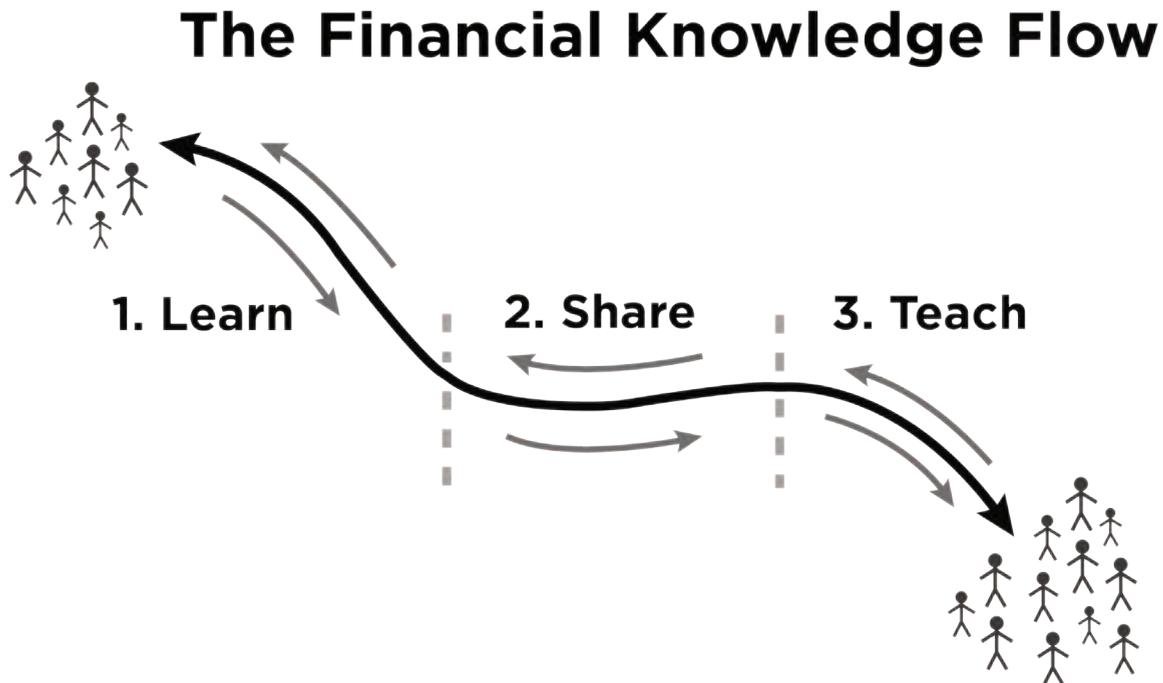
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# Action Steps

Let's start applying what you're learning and break some bad money habits to clear the way for good money habits.

**▶ The Financial Knowledge Flow:** Consider where you are in The Financial Knowledge Flow. Mark yourself in the flow and brainstorm what's the next step for you to keep flowing forward.



**My next step is:**

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 **Monthly Money Questions:** At the beginning of each month, choose one financial topic to focus on (e.g., “What’s the best way to start investing?” or “How can I improve my credit score?”). Spend the month researching the answer using multiple sources. At the end of the month, write a summary of what you’ve learned and how you’ll implement it. Map out what you want to learn in the next quarter of this year.

**Month 1 Financial Topic:** \_\_\_\_\_

My plan to research this topic is:

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**Month 2 Financial Topic:** \_\_\_\_\_

My plan to research this topic is:

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**Month 3 Financial Topic:** \_\_\_\_\_

My plan to research this topic is:

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- ▶ **Financial Literacy Power Hour:** Consider the money experts from The School of Greatness podcast listed in chapter 12. Set aside one hour each week for the next month to focus on growing your financial knowledge. List the four expert podcasts interview you'll listen to this month:

PODCAST EXPERT INTERVIEWED	ONE ACTIONABLE INSIGHT TO APPLY

After each session, write down one actionable insight you learned and plan how to apply it in your life that week.



## Bankable Quotes

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**“Financial literacy—or the Mastery Habit—is critical to discovering and enjoying financial peace.”**

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**“If you want to make money easy, you must grow your money wisdom.”**

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**“If you want to earn more, you need to learn more.”**

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# Conclusion

A rich life and financial peace are possible. Do you believe it?

Hopefully, this workbook has helped you walk through and apply the lessons from the book.

When you put what you've learned into practice, you're able to navigate the steps necessary to know your Money Story, reset your Money Mindset, and prepare well for more money.

That sets you up to own your worth, so you can earn more and create the abundance you desire!

Remember, the key to making more money is you.

**—The Greatness Team**