

102: The Art of Building Wealth (and Keeping It!)


Milestone Checklist

Loral Langemeier

Want to gain as much knowledge as possible out of Get Yourself Optimized? Read on below for a **milestone checklist** that gives the next, real steps you can take for introducing these insights and optimizing your life.

Get **YOURSELF OPTIMIZED**

HOSTED BY **STEPHAN SPENCER**

A close-up portrait of Loral Langemeier, a woman with long, wavy brown hair, smiling warmly at the camera. She is wearing a dark blue top.

**"You become a millionaire by making money,
keeping money, and investing money."**

LORAL LANGEMEIER

STEPS YOU CAN TAKE TODAY

**Want to take charge of your health, wellness, and success?
Here are steps that can move you closer to your goals – today.**

- Attend at least one Accountability Call per week.
- Attend at least one Laser Call per month.
- Digest items in WFP, complete workbooks.
- 120 Day Plan completed.
- Business accounts set up.
- Business Plan created.
- Wealth Plan created.
- Content developed for website.
- Website created.
- Landing page created (collect names, phone #'s & emails).
- Set up a data base system.
- Lead generation – 10-20 names, phone #'s & emails per day.
- Call 20 people a day.
- Complete money rules.
- Solidify sales process.
- Marketing/Sales Funnel complete.
- Fill in data base.
- Quick Books or equivalent set up.
- Filing cabinet organized.
- Create/update/review social presence (Face Book, Twitter).
- Set up Entity ('s).
- Create Tax Plan.

- Asset Plan begun: Asset classes and percentages allocated to each.
- Write a Press Release.
- Team in place (hire as needed).
- Have a “Grand Opening” party.
- Speak or Present at 2-6 events per month.
- Update & review profit & loss statement (bring to session 3).
- IRA or retirement funds strategy.
- Develop 2 new pieces of content every week.
- Write an article and or Blog.
- Continue to educate children if applicable.
- Continue Asset Allocation Planning.
- Insurance & Trust review.
- Perform Due Diligence on 2 Different Investments.
- Find JV or Affiliate partner.

To view the transcript, resource links and listen to the podcast, visit:

<https://www.getyourselfoptimized.com/the-100th-episode-stephan-spencer-with-orion-talmay/>