



INVESTMENT MANAGEMENT, Inc.

TO:

RE: Post Meeting Summary Guide

DATE:

This worksheet is designed to help to reflect and to make more concrete, the things we discussed together. It will help clarify key next aspects for moving through your life transition. And it will begin to help us to formulate a picture of just what personal currencies need attention and what areas need more focus to prepare a more formal process of financial asset management that is derived from and aligned to your life purpose.

Like all things in life, it is really easy (often discouragingly easy) to fall back into old unsupportive patterns and attitudes. This is especially true at life crossroads where fear and uncertainty heighten our own unconscious defenses and self-protective mechanisms. The problem with these automatic and largely unconscious reactions during times of fear and uncertainty is that it keeps us stuck in old ways of thinking, being and acting. These old ways do not serve what is required for a new and conscious approach to your life, your money and your secure future. For this reason, I offer you these questions and worksheet to help SEE the old patterns and to start a process of engaging in the question of vision and true self.

With this worksheet and process of self-reflection, we can more directly discuss your unique needs, opportunities, threats, and vision. From this we will be able to start to clarify an initial working draft for protecting and growing your financial assets and growing your conscious relationship with your money in a way that best suits your life goals.

It is an honor to serve your next phase of life. I look forward to talking soon.

Mattawe P Clements

Mattawe P, Clements ~ Managing Principal

703 Tico Road ~ Ojai, California 93023 ~ office: 805.640-9999 cell: 805.443-4103 fax: 805.640-9989 Matt@MPClements.com

ClementsInvestmentManagement.com

A Registered Investment Advisory Firm Specializing in Full-Service Wealth-Building and Life Transition Strategy. License #0796826

- 6) What plans, ideas, programs or projects, people or things do you find especially interesting and exciting (inspiring) to your life (emotionally, physically, spiritually, mentally, financially)?
- 7) Working with myself and my team at Clements Investment Management, Inc. requires a conscious commitment to seeing and conquering old fear and resistance patterns as part of engaging a process together that will identify, clarify, and design an integrated financial strategy of wealth management that is driven by your true life path.How wiling are you to take these next steps necessary to follow your next path with commitment and perseverance? (please reply in 1-100%)

_____ % willing/committed

7a) If less than 80% committed, what stands in the way?

- 8) Since our meeting, what thoughts, ideas or fears may have come up that you would like to share or discuss?

Please keep copy for your own work, and email, fax, mail or bring me a copy from which to discuss in our next meeting.

Mattawe P, Clements ~ Managing Principal

703 Tico Road ~ Ojai, California 93023 ~ office: 805.640-9999 cell: 805.443-4103 fax: 805.640-9989 Matt@MPClements.com

ClementsInvestmentManagement.com

A Registered Investment Advisory Firm Specializing in Full-Service Wealth-Bulding and Life Transition Strategy. License #0796826