

7 Prosperity Projects

Seven projects to prioritize your most urgent money decisions.

Plug the Holes in the Boat

The first project focuses on emergency preparedness and risk management. You will learn how to create an emergency fund, address major life uncertainties with appropriate insurance, and pay down high-interest debt.

01

02

Get Free Money

Discover how to maximize employer benefits like HSA matching, retirement plan matching programs, and employee stock purchase plans.

03

Optimize Retirement Plans & Tax Benefits

You will learn how to optimize your retirement savings by considering the tax structures of each of your retirement plan options. You'll assess your current and future tax situations so you can choose the right retirement accounts.

04

Decide Who Is in Charge

This project will help you ensure your family relationships stay strong and that your wishes are carried out if you die or become disabled.

05

Reduce Unwanted Debt

This project will guide you through the process of prioritizing and paying down debts to improve your financial health.

06

Build Non-Retirement Wealth

Explore the benefits of investing outside of traditional retirement accounts. From real estate to small businesses and standard brokerage accounts, this project emphasizes building wealth through diverse investment opportunities.

07

Swing for the Fences

This final project encourages you to take calculated risks with potential high rewards. You will learn how to identify and pursue investment opportunities that could significantly boost your wealth.