



FETTA  
FINANCIAL ALLIANCE



# THE BLUEPRINT TO FINANCIAL FREEDOM

## *Checklist*

## To my followers, members and clients:



You may be reading this Blueprint to Financial Freedom checklist as a relatively new introduction to me or you may already be actively working your way through this with me and my team. Either way, there are some important things I want you to know about this checklist.

Firstly, this is the result of over a decade of research I have done studying the historical top 1% of wealth. I did not come up with these things on my own and they were all used to successfully build wealth hundreds or more years before my time. I simply studied the top 1%, found the common things they were doing and organized the sequence of it, while identifying the proper tools and systems in today's world.

Second, this is not a "financial plan" nor is it "financial advice". This is a blueprint. Like with building a dream home, a blueprint requires you to dream up what the end result should look like, gather the correct materials, hire the right people to help you, and financially fund the thing you are building. You may not want to be the one swinging the hammer and that's fine, but this is not a system of handing it all off to an advisor and hoping they're going to do the right thing. Keep in mind the word "advice" comes from the word "opinion". And an opinion is only as good as its source and the results it has produced. That's why we look to the historical top 1%. We want opinions that have worked time and time again.

Third, this only works if you follow the full sequence, in sequence. Like with our house example, if you skip the foundation because "it's too expensive" or you don't like that part, and start working on interior decorating instead because it's more fun and prettier, don't be surprised when the final house isn't livable. Sequence matters. There is an exact sequence to all of this.

Lastly, this only works if you do. You will need at all times to apply the concept of Monetary Velocity. In our own terms this means flowing the greatest amount of money, at the fastest speed possible, to the wisest possible decision in order to expand the economy of your own personal household. Like in the world economy, when money stops flowing and becomes stagnant, the economy shrinks. When money flows quickly and abundantly, particularly to wise decisions, an economy expands and sustains that expansion. Your personal economy works the same way.

### **One final rule:**

Only do what makes sense to you. If something doesn't make sense, take a step back and learn about it first. See if it does make sense. If it doesn't, it doesn't. You are in charge and in control of your personal finances and no blueprint, plan, advice, opinion, or otherwise should override your own common sense and understanding.

This is my gift to you and whomever you wish to share it with. I hope it creates financial freedom for you like it has for me and many others.

Yours in Purpose, Wealth & Freedom,

**Jerry Fetta**



## Phase 1: Start Basic Training

- ☐ Sacred Account Certification
- ☐ How to Create Wealth Course
- ☐ The Laws of Wealth Course
- ☐ How to Create Wealth by Jerry Fetta
- ☐ The Blueprint to Financial Freedom by Jerry Fetta
- ☐ How to Protect Yourself Against Bank Failures by Jerry Fetta
- ☐ The Man in the Arena by Jerry Fetta

- ☐ Phase 2: Clarify your personal definition of “Abundance & Prosperity” in all areas of life, in writing.

- ☐ Phase 3: Calculate your monthly Residual Income goal to exceed your Generosity, Expenses, Taxes & Savings.

- ☐ Phase 4: Obtain & fund your Sacred Account with at least 15x your age per month minimum contribution.

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☐ Phase 5: Complete the Big 3 Challenge

☐ Phase 6: Update your Blueprint Progress & do a Wealth Potential Analysis

☐ Phase 7: Achieve 1 month of reserves saved in your Sacred Account + 1 month expense limit on Cash-Back credit card

☐ Phase 8: Buy back all non-mortgage debt with your Sacred Account

Phase 9a: Basic Protection:

☐ Auto Insurance

☐ Home/Renter's Insurance

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☐ Liability/Umbrella Insurance Coverage

☐ Health Insurance

☐ Life Insurance (if surplus coverage is needed)

☐ Identity Theft Protection & Restoration

☐ Legal Liability Insurance

### Phase 9b: Advanced Protection:

☐ Long Term Disability Insurance

☐ Home Security

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☐ Long Term Care/Living Benefits Coverage

☐ IRS Risk Mitigation

☐ Anonymous Holding Corp.

☐ Trusts

☐ Will

☐ Living Will

☐ Financial Directive

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☐ Healthcare/Medical Directive

☐ Phase 10: Save 6 months of expenses in your Sacred Account as reserves by repeating phases #2-9

☐ Phase 11: Self-finance large purchases with your Sacred Account (vehicles, furniture, education, personal development, home down payment, renovations, etc.) by repeating phases #2-10

☐ Phase 12: Unlock Home Equity by repeating phases #2-11

☐ Phase 13: Achieve Qualified Investor status (all prior phases complete, plus surplus to invest with) and begin investing for Residual Income by repeating phases #2-12

☐ Phase 14: Employ tax reduction plan

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- ☐ Phase 15: Achieve the 40% Club with personal savings rate of gross income by repeating phases #2-14

- ☐ Phase 16: Achieve Sophisticated Investor status (all prior phases completed, at least 3 investments done, and a \$250,000 Net Worth) by repeating phases #2-15

- ☐ Phase 17: Achieve Accredited Investor status with \$1 million Net Worth by repeating phases #2-16

- ☐ Phase 18: Begin investing in vetted Accredited Only opportunities by repeating phases #2-17

- ☐ Phase 19: Achieve Financial Independence (Residual Income > Generosity+Expenses+Taxes+Savings) by repeating phases #2-18

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- ☐ Phase 20: Achieve Qualified Purchaser status at \$5 million Net Worth by repeating phases #2-19

- ☐ Phase 21: Achieve Private Foundation Status at \$10 million Net Worth by repeating phases #2-20

Always plan your next step.  
Never skip steps.  
Understand it before you do it.

**Jerry Fetta**

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