

Money Mastery
Coaching™

MONEY MASTERY PREP KIT

*Your First Step Toward Financial
Clarity, Freedom, and Legacy*

BY WADE L. REED, FINANCIAL COACH¹

PREP KIT



WELCOME TO YOUR FOUNDATION

- ✓ Eliminate chaos
- ✓ Reduce risk
- ✓ Build momentum

Why This Prep Kit Matters

Use it to prepare for:

- Loan applications
- Meeting with advisors
- Tax time
- Emergencies
- Legacy planning



Use It Alongside Your Monthly Spending Planner & Tracker

The Money Mastery Prep Kit is your vault.

The Monthly Spending Planner & Tracker is your dashboard.

Together, they give you a complete command center for your money:

- The Prep Kit stores your documents securely and systematically
- The Tracker helps you make real-time spending decisions and monitor cash flow















Start by getting organized here... then track your spending habits, identify leaks, and plan with clarity using the Tracker.

[!\[\]\(9c2e8d1b5bd77cb5c9f83b7a9cff79fd_img.jpg\) Download the Monthly Planner & Tracker](#)

"You're not organizing files—you're building financial confidence."

QUICK START CHECKLIST

Before diving in, check off these key actions to create instant momentum:

 Choose your cloud storage method (Google Drive, Dropbox, OneDrive)	 Pro Tip: Use color tags in Google Drive or folders in Dropbox to stay organized.
 Create your main folder: “Money Mastery Vault”	 Tip: Keep all financial documents inside this folder to make tracking easier.
 Download the Monthly Spending Planner & Tracker	 Pro Tip: Rename your file with the current month for easy reference (e.g., “Spending_Tracker_Nov2025”).
 Gather the 6 document types listed in Step 1 below	 Tip: Scan or photograph paper documents to keep everything digital and secure.
 Follow the 3-Step Filing System	 Pro Tip: Review and update your files at the end of each month to maintain order.
 Secure your folder and documents with password protection	 Tip: Use a strong password or enable two-step verification for extra security.
 Celebrate: You’ve just started your journey toward financial mastery	 Motivation: Consistency is key—small steps today lead to financial freedom tomorrow.



Just 30 minutes of setup now saves hours later



STEP 1: GATHER THESE ESSENTIAL DOCUMENTS

To build your Money Mastery Vault, start by collecting the following:

- Bank Statements** (3–6 months)
- Tax Returns** (Last 2 years)
- Insurance Policies** (Life, Disability, Biz, Auto, Home/Renters, etc.)
- Investment Accounts** (Brokerage, IRA, 401(k), etc.)
- Credit Reports & Scores** (MyFico.com)
- Business Financials** (P&L, Balance Sheet—if applicable)





SAVE USING THESE NAMING CONVENTIONS

Use consistent naming to keep everything clear and searchable:

[Type] - [YYYY-MM] - [Institution]

Collect the last 3 months of your financial transactions from your bank and credit card statements.

Use the following naming system when saving the files to your cloud-based folder. General Format: Bank-YYYY-MM Bank Name Statement.

If the bank statement you are saving is your January 2024 checking account statement from Chase Bank, save it as follows:

EXAMPLE:

Bank-2024-01 Chase Checking Statement

Taxes Receipts_2025-11-H&R Block

Bank-2025-11-Bank of America



File Naming Formula

Why this helps:

- Faster taxes
- Smoother financial reviews

Insurance Policy-2025-01-Paradigm Life

Credit Report-2025-02-MyFico



STEP 3: SECURE YOUR VAULT





Protect what you've built:

- Password-protect files and folders
- Enable 2-step verification on cloud accounts
- Share access only with trusted professionals

Set a recurring quarterly reminder to update your Vault

Security isn't a one-time task—make it part of your system.



- ✓ Password-protect 
- ✓ Enable 2FA 
- ✓ Trusted access 
- ✓ Review Quarterly 



YOU'RE 80% DONE!



You've just built what 90% of people never do—a real financial foundation.

- ✓ **Take 15 minutes each month to update your files**
- ✓ **Review and rename any new documents**
- ✓ **Mark your calendar for a quarterly vault check-in**

This small habit creates big peace of mind—and it frees up mental bandwidth for the next level of wealth building.

Financial clarity builds **CONFIDENCE.**

Keep going—you're almost there



- ✓ Finalize your document folders
- ✓ Review your spending tracker
- ✓ Back up your files securely

READY TO BRING IT ALL TOGETHER?

The Total Wealth Organizer (TWO) helps you take the next step:

- Integrate goals, documents, and financial contacts**
- Maintain a living balance sheet**
- Turn this foundation into a launchpad for wealth-building decisions**

 **Get TWO now for just \$27**

 **[Claim Your Upgrade]**