

CHARLOTTE LAUNCH

UNLOCK YOUR EXCLUSIVE PRICING



TIER 1: THE FOUNDATION

(Credit & Cashflow)

Module 1: Mindset Reset & Financial Vision

- The Wealth Mindset; Setting the Vision (6-mo/1-yr goals); The Importance of Credit as leverage.

Module 2: The Credit Correction Blueprint (DIY + Guidance)

- Understanding Your Report (Pulling/reading);
- Factual Disputing (Legal process); Template Library (Dispute letters); Rebuilding Strategy (Positive tradelines).

Module 3: Mastering Cashflow & Budgeting

- The Anti-Budget (Automated system); Expense Audit (Leaks & negotiation); Debt Paydown Strategy (Snowball/Avalanche); Building the Emergency Fund.



TIER 2: THE BUILDER

(Business & Funding)

Module 1: The Business Foundation

- Entity Selection (LLC, S-Corp, C-Corp); Structuring for Success (Registration, EIN, licenses); The Operating Agreement (Protection).

Module 2: Building Business Credit (Separate from Personal)

- The Business Credit Ecosystem (DUNS, Paydex);
- Vendor Credit (Tier 1, net-30); Revolving Business Credit (Tier 2 & 3, non-reporting cards).

Module 3: Obtaining Capital & Funding

(*IMPORTANT NOTE: Transparency is vital. Please be advised there is an administration fee of 8% - 15% on all successful funding secured through our network. Grant submissions are handled differently; see below.*)

- Funding Readiness Audit; Types of Funding (Debt/Credit: Term loans, lines, SBA); The Application Process (Pitch preparation); Leveraging Credit for Growth (OPM).

Module 4: Grant Funding Strategy

- The Reality of Grants (Competitive, tedious, specific);
- Assessing Likelihood (Strong profile & track record);
- Submission Service & Fees (Up-front administration fee required due to intensive labor).

Coach Toni
MINDSET & WEALTH MASTERY COACH

CHARLOTTE LAUNCH

UNLOCK YOUR EXCLUSIVE PRICING



TIER 3: THE MASTERY (Assets & Protection)

Module 1: Asset Acquisition Strategy - Tax Liens & Deeds

- Introduction to Tax Lien Investing (Process & risks);
- Finding & Researching Properties (Due diligence);
- Bidding Strategies (Winning auctions); Post-Auction Process (Redemption & foreclosure).

Module 2: Introduction to Real Estate Investing

- Investment Strategies (Wholesaling, flipping, buy-and-hold); Analyzing Deals (Running numbers);
- Financing Your Deals (Business credit, private money).

Module 3: The Fortress of Protection - Trusts

- Why You Need a Trust (Avoiding probate, privacy);
- Public vs. Private Trusts (Differences & use cases);
- The "Holdings" Structure (Owning LLCs & assets);
- Legacy Planning (Generational wealth).

**Module 4: The Infinite Banking Concept
(Optional/Advanced)**

- Being Your Own Bank (Whole life insurance);
- Creating Velocity of Money (Moving money through assets).