

Ahoy, Money! Webinar

Presented by Author
Paul Lemon, CPA/PFS, CFP®



Worksheet page 1

1

Welcome to the Ahoy Money Bonus Webinar.

I'm the author, Paul Lemon, and I'll be your guide through this video that I hope will make your experience with the book and worksheets an enjoyable and rewarding one.

Why this Webinar?

To Make your Journey
With
Ahoy, Money!
Both
Fun
& Transformative.



Worksheet pages 1-2

2

“Making your journey fun and transformative”

I’m not one for reading the ‘instruction manual’ – so I understand if you want to just dive into the book.

Since you’re watching this video, however, There’s hope that you’ll take my word that the few minutes you spend here could make a world of difference in what you end up getting from the book.

Fun & Transformative?

- Fun and Transformative?
 - Not usually linked
 - Like “money” and “happiness”!
- “Fun”
 - It feels good to be healthy & balanced.
- “Transformation”
 - Think of it like stripping off layers of paint to get to the beautiful grain of the underlying wood.
 - We all have these layers that tend to hide who we really are. They suffocate us to the point of searching out a cleansing process.
 - This could be one of those opportunities!



Worksheet page 2

3

All of these words that aren't usually equated with one another!

This slide reminds us of those times we got the stripper out and went to work on the process of transforming an old dresser or chair. You'd never know what a beautiful piece of wood lie beneath all those layers!

In this webinar I hope to remind you of the tremendous opportunity your money work presents – to reveal the beauty of the “grain” of your True Life!

What will the Webinar Cover?

- Explain your options with “Ahoy, Money!” and it’s companion book “Ten Weeks to Financial Awakening.”
- Provide full-size downloadable forms with helpful suggestions not found in the book.
- Recommend precise steps for getting started.



Worksheet page 2

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This slide shows what you’ll gain in quantifiable terms.

“Ahoy, Money” is a book that opens up a whole new way of seeing money and your life – it is truly an “Ahoy” experience – one of discovering new ways of seeing and being.

The forms, my other book (TEN Weeks), these webinars – all these items are just tools to help us in this process of discovery.

But who am I?

- I'm just like you. I struggle with money and how it can easily snare me into defensive patterns of controlling, scheming, hoarding, and worrying.
- I'm a professional that goes to work every day to assist my clients in finding genuine financial freedom.
- The "advice" I give you, keep in mind, I'm giving to myself, too.

We're all on this ship together – setting out
Across this vast Sea of Money!



Worksheet page 1-2

5

Lest you think I think, I have all the answers – this slide will remind us all that I don't!

I've included this slide because you deserve to know a little about me. Dealing with your money is extremely personal. You need to feel comfortable with your guide, even though we may never meet face to face.

Keep in mind that what really qualifies me to journey with you is not just my 32 yrs. Of experience and professional designations.

It's the fact that I suffer with money, too. That I constantly have to work at giving money my attention rather than my energy.

And a picture – to keep the rats out of the basement!



Worksheet page

6

And here's my mug shot. It was taken several years ago, so there's a bit of deceptive advertising here.

If nothing else, you can use it, as I said, to keep the rats out of the basement

Or

Convince your nagging parents that you now have a real-life financial advisor

Or

Just remember that there is really a person out there who cares enough about you offering the gift of your life to the world, to offer a different paradigm with money.

How long will the webinar take?

- About an hour to watch the entire video
- Less than 10 minutes to listen to the Introduction and Chapter 1 segment.
- Less than 5 minutes if you choose to simply download the forms and webinar slides.



Worksheet pages 2-3

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This slide addresses our common obsession with time.

These webinars are split into sections – so your computer can handle them easily, and also so you can watch them as you're ready to engage with the worksheets.

I'd suggest you use the 2nd option listed here.

Why Download the Worksheets?

- The full-size format is easier to write on than the smaller worksheets in the bound book.
- Your private responses are kept confidential in your own “Ahoy, Money!” notebook if you so choose to purchase a 3-ring binder.
- Additional suggestions and comments are included (highlighted so you can easily find them) in the downloadable forms that aren’t in the book.



Worksheet page 2

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Why all this talk about the Worksheets?

Because they are the key to you really experiencing this new way with money.

They aren’t required – just recommended.

I also recommend you download them so you aren’t struggling with writing your answers in a bound book – that someone else might happen to pick up and read.

And – just in case you need it – there’s extra guidance on the downloaded forms.

How are these Slides Linked to the Worksheets?

- Notice the little “Worksheet page” reference at the bottom center of each slide?
- That’s the page reference to the downloaded forms packet.
- The packet contains 72 pages overall.
- I’d recommend you buy a 3 ring binder, and an 8 topic divider packet.
- 3 hole punch the forms and a printed copy of these slides – and you’re ready to go!



Worksheet page

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This slide explains how the slides are formatted and relate to the Worksheets.

As you listen to these slides, simply turn to the page of the downloaded forms packet that is referenced at the bottom of the page.

Taking a few minutes to organize print, 3-hole punch, and insert all these pages into a 1” binder will be critical to the papers not getting all jumbled up.

I’d recommend discarding tab 8 and simply inserting the introductory section before the Tab 1 Divider. The rest of the worksheets, then, can go into the tab that relates to the chapter – Tab 1 for Chapter 1, etc.

How do I download the Worksheets?

- Type www.ahoymoney.com/worksheets into your web browser to download all the worksheets included in the book.
- Type www.ahoymoney.com/webinarslides into your web browser to download all the powerpoint slides for this webinar.



That's All You Have to Do!

Worksheet page 2

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I'd stop and download these forms now

Along with setting up the notebook I mentioned.

I'd recommend putting the printed version of these webinar slides in the divider that it's worksheet reference at the bottom of the page relates to. So, for example, the slides you've listened to so far will go in front of divider 1 – the introduction section.

If you can't do this now, you're on a plane or something – please do it as soon as you can.

When do I complete the Worksheets?

***My opinion is the following
process works best:***

1. Print out the Worksheets and Slides.
2. Read one chapter at a time.
3. Listen to the Webinar Session for that chapter.
4. Complete that Chapter's Worksheet.
5. Repeat steps 2-4.



Worksheet page 2

11

As I mentioned earlier – I recommend this approach to using this Webinar.

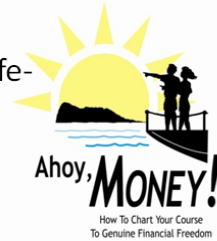
(Read the steps)

Watching all the video sessions up front is fine – it just may be a bit overwhelming until you've had a chance to read the chapters and see how everything fits together.

Webinar Session 1

Introduction

- Introduction
 - The book is based on a metaphor that compares our human life and journey with money as a sea crossing.
 - “land” – our current life.
 - “other shores” - what we long for in life- or an “expanded” or “meaningful” life.
 - “Seas of transformation” – Growth experiences that stretch us.



Worksheet page 4-5

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The introduction of the book sets the stage for this metaphor I am using to help us gain a fresh perspective on money.

In a nutshell, the book likens our current life to the land on which we're living – it's become more like a prison than a paradise. We long to sail for other shores – to live a more meaningful life – and the challenge of the open sea stands in our way.

If we're going to experience a different life, we have to cross the Sea of Money.

The “Sea of Money”

- The transformative agent of money if we;
 - See it for what it really is.
 - Honestly face how we currently see it.
 - Question what we’ve been told about it.
 - Practice giving it our attention, rather than our precious life energy.

Our Best Ally or
Worst Adversary in Claiming
A “new shore”!



Worksheet page 5

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Page 5 of the Worksheet packet reminds us that we all get hooked into believing that the cure for our discontent and money suffering is to have more money.

But the research shows that such a quest is futile – that the correlation between our happiness and the amount of money we earn ends at \$10,000 of annual income!

So, it’s time for a second look at money and accessing it as ally to living authentically!

“Ahoy, Money!” – a Quick Read?

- Possible to read the whole book in less than 3 hours.
 - Well worth the time in that you will have been given a unique chance to honor your life with a radically new way of relating to money.
- Best, however, taken in bite-size pieces, with time for “digestion”!



Worksheet page 7

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Most book purchasers don’t read past the 1st chapter – so even a Quick Read is a huge improvement over that!

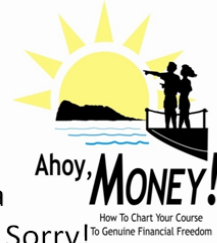
My comment on WS page 7 reminds us that our thinking has been conditioned for years. Some people might call it “brainwashing” – so expecting a transformation of that thinking in a few hours is unrealistic.

Notice our metaphor is a Sea Crossing – not a Stream Crossing!

Initial Choices are Critical

- If you choose to skip the Worksheets –
 - You'll likely not go back later and complete them.
 - The book will offer great information, but it will not necessarily provide practical transformation of your current relationship with money.
 - You'll miss out on the most important reason for doing any kind of money work – your life.

Honor Your Life by Taking a
Little Extra Time – You Won't be Sorry!



Worksheet page 7

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I know I'm asking for a lot in including 7 Worksheets in a small book.

I wouldn't ask you to directly engage with this material if there was another way – but, in my opinion, actually rolling up your sleeves and honestly facing your life and some day to day money issues is necessary if you want genuine freedom with money.

Your life is worth the investment of a few extra hours – don't miss out on this opportunity – make a commitment to transformation rather than simply more financial information.

What is “TEN WEEKS”?

- “Ten Weeks to Financial Awakening: A Guidebook to the Creation of Your Own Financial Plan Using Quicken® Software”
- A book with 4 tutorial CD’s that “teaches you to fish” rather than “giving you a fish.”
- Written in 2003 and updated in 2007.



Worksheet page 8

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Page 8 of your worksheet packet explains how “Ahoy, Money” can be integrated with my “Ten Weeks to Financial Awakening” book and 4 CD set.

I believe that genuine freedom is rooted in the details of our lives – so offering a new philosophy about money is a waste of breath unless there is guidance of how to practically use it day to day.

I am also committed to empowering clients – rather than fostering unhealthy dependence. This money stuff isn’t rocket science, and that’s why I believe everyone should be given the option of “learning to fish” – that’s what TEN WEEKS offers.

More about “TEN WEEKS”

- I wrote it after working with hundreds of clients and seeing the limited benefit of offering financial advice without asking for their personal involvement.
- A 3 year process to write a how-to guide to financial mastery for anyone willing to do give money their attention .

No Need to Pay an Advisor
Thousands of Dollars a Year!



Worksheet page 8

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Is a “how to” guide for everybody – not necessarily.

Am I anti-advisor? – No, I am one.

I simply saying that:

1 – You can’t delegate ALL the work and experience a huge shift with money.

2 – You don’t have to be rich enough to hire a fee-only advisor to do this work.

The “TEN WEEKS” Materials

- Basic Package:
 - 705 page Guidebook with 230 pages of financial reference material on insurance, investing, debt management, tax planning, retirement planning, and estate planning.
 - 4 Quicken® Tutorial CD's that provide screen by screen guidance in using Quicken® to manage your finances.
 - Worksheet Workbook – Extra Set of Worksheets

Cost – Regular Price: \$197 + shipping
“Ahoy, Money!” Owners: \$97 + shipping



Worksheet page 8

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Notice here that the Guidebook includes 230 pages of detailed information on every aspect of your financial life –debt, investing, insurance, taxes, retirement, and estate issues.

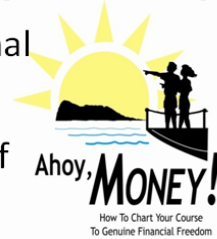
You don't have to complete the entire course to benefit from this Resource.

Since you're already standing on the dock, I'd like to make sure you have all the provisions you need to reach your destination.

That's why I'm offering you the TEN WEEKS Basic Program for \$97 instead of it's regular \$197 price.

Your Options for “Ahoy, Money!”

- See Chart:
 - Read Only
 - Read and Complete Worksheets
 - Read, Complete Worksheets and use TEN WEEKS as a financial reference for additional practical guidance.
 - Prior Step + Complete some or all of “TEN WEEKS” course.



Worksheet page 8-11

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Pages 8-10 of your worksheet packet illustrate the 4 ways of using “Ahoy, Money” and the TEN WEEKS materials.

(Read the options on the slide)

Rather than tell yourself you don’t have time for this – why not start out with the positive belief you are ready and able for this challenge – and that there’s no huge rush in getting it done.

You choose to adjust your mindset from fixation on a destination to focusing on an enjoyable journey.