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Ready Set Prep Call – Life Goes on Roadmap™

Nancy Juetten: Hello, it's Nancy Juetten.

Steve Juetten: Hi, it's Steve Juetten.

Nancy Juetten: And we're the co-founders of Life Goes On Roadmap and we want to welcome you to tonight's call. It's the ready, set prep call for the get it done day that's happening this Saturday or on a date that you choose when you enjoy these replays that you're convenient. So welcome. Welcome. So glad you're here. The Life Goes On Roadmap system for personal financial information organization is a game system changing system for peace of mind that wins once completed will give you so much confidence about being able to drive your life forward no matter what happens. And so we're really, really glad that you're here.

We have licensees from across America and Canada who believe in the mission of empowering their clients to get ahead of life before life happens in this practical, personal and profound way. And we want to thank them for believing in the mission and sharing it with their clients because together the rising tide will lift all the boats and we'll have a whole lot more families ready for anything because we're all working together to achieve that mission. So thank you, thank you to our licensees, who are maybe the reason that you are alive on this call today. Thank you for getting on board using all the tools and resources we're providing to get your personal financial information organized and playing to win. Unlike other systems you may have seen or heard about, we do not take a gloom and doom approach. We're all about helping you to become and I'm ready for anything road tripper, who's ready for anything and we want you to play to win because when you get to win the game, this turn it into not something you put off until later, but something you look forward to and something that you celebrate.

Steve Juetten: But we're thrilled that you're here today. And as I tell Nancy frequently, I love doing these kinds of calls that we would like to do like once a week if she would let me. But we're thrilled that you're here, so thank you very much.

Nancy Juetten: So a little bit about us. I've been a successful business owner since 2002 and I've written three books and I speak often about how to guide speakers and experts to get ready for opportunity before opportunity knocks. A simple Google search for Nancy Juetten will let you know that I've accomplished a great many things in service to the success of entrepreneurs and authors and speakers around the world.

But about a year ago I really shifted my focus because I wanted to guide families to get ahead of life before life happens. It's simply a rejiggering of my expertise to serve something that I think is personal, profound and practical. I believe and I believe I am a big believer at getting ahead of life before it happens, is a huge gift to share with those that you love the most. And I'm imagining that you agree with me since you're here on this call.

Steve Juetten: And I'm Steve Juetten and I'm a certified financial planner. I've written a couple of books, one called Ditch the Guesswork: Creating Reliable ROI for Time-Starved Investors. And another one that I recently coauthored that is aimed at early career professionals called Smart Money Moves. So I've been around in the financial planning world for a while and actually Nancy and I combined our wonderful skills together to create this wonderful system for you.

Nancy Juetten: Absolutely.

Steve Juetten: Now, I also want to mention to you that we are proud parents of Kyle, our son and that's champ are Kakapo who's standing in our backyard. So we're just like you probably just like you. We have a life or we have a son, we have a dog, we take care of our house. Life can be very busy and we certainly get that. And that's actually the reason that we got here is because life was getting in the way. And Nancy's is going to tell you a little bit about that.

Nancy Juetten: Yes. So I went on for me about a year ago when three women that I was close to cross paths with death, divorce and disability in the same week. It used to be these things were happening to other people. All of a sudden in the same week they were happening to friends of mine and I had this wake up call that I could be next and I wanted to change my faith for the better. I wanted to take the opportunity to find out how to get on equal footing with regard to running the household, paying the bills, managing our investments, knowing where our important documents are because if something should happen to Steve, I wanted to be able to drive and if I needed to look after him, I wanted to be able to do that with confidence and ease, but I didn't have that feeling windows three black cats cross my path.

Steve Juetten: Yeah, the statistic is that 70% of women will survive their partners. That's a staggering number when you think about it. 70% of women are going to survive their partners.

Nancy Juetten: And nine out of 10 prime timers can't find their important documents at a moment's notice. Head in the sand it is a problem and denial can be very expensive and we want folks to get ahead of that before life turns because you know what?

Steve Juetten: The reality is that life turns on a dime and circumstances change. Life happens and it's when life happens in those clutch moments and some people are caught without instant access to what they need to remain in part in control. This is the

source of drama, trauma and chaos. And this is the pain we're trying to relieve for people. In a clutch moment when something happens, we want people to be calm, have ease and peace of mind. And that only happens with some pre planning, which is what we're all about here.

Nancy Juetten: Fact is that the road of life is littered with shelf help that never gets put to good use. Getting around to it never happens and gloom and doom can get in the way. And our promise to you is that you will get your life and death ducks in a row so the rest of your life can be a whole lot smoother swimming. We promise that you're going to get this done and it's going to be fun. So we have a roadmap acronym and I'll walk you through. R, resolve to get your personal finances in order today. O, organize important documents and resources, A act because doing nothing really makes an impact. D, ditch, gloom and doom, declare a deadline and get this done because denial will not serve you and the devil is in the details. M, manage change as it happens because it always does. A, allow access to the right people who need to know where the important details are stored and the most important one is P for people first. Money matters are personal, ditch procrastination to ensure that the people in priorities get the proper attention.

Steve Juetten: So, are you ready? When you take a trip, don't you usually think about it a little bit? Don't you usually check the tire pressure in the tires in your car. Don't you usually get the oil change? Don't you make sure that you have everything that you need before you start on a trip. So that's what this call was about today. So think of this as we're going to pack before we go on a road trip.

Nancy Juetten: So what do you need, Steve?

Steve Juetten: Well, you have a number of these items and Nancy's going to tell you in a moment what you need to do if you don't have them. But these are the primary items that you have for your trip. You should have your Life Goes On Roadmap game board. And the idea there is we want you to have an idea of the progress that you're making. You should have your guidebook and this is the instruction manual for the organizer that we're going to talk about next. The guidebook is something you don't need to print out if you don't want to. If you already bought a printed version of this, then you have it. But the guide book will take you through it and we wrote the guide book to give you tips and ideas and suggestions. So make sure you refer to it. And then you have the organizer and this is where you're going to enter all your personal information. It's really a pretty simple tool that you're going to use the capture that information, but just making sure you have it loaded and ready.

Nancy Juetten: And then the other element of the trip is that we actually have a life both on roadmap community. This is a client on the Facebook group where you can gather around the truck stop to get support, ask for directions and make new friends. And this is particularly important if you were doing this on your own, not during the live call and you're going to have questions. I'm active in the

Facebook group Monday through Friday and you can ask questions and I'll get back to you in a timely manner. And if there's additional resources you need, I'm happy to point you in the right direction. And the main event of course is the virtual, get it done day that's happening to Saturday. During our research we found out that 45% of the people like to do these things on their own schedule and 55% want to go with guidance experts support so that their feet are held to the fire to get this done.

So if that's you, Saturday's our day, we're going to get this done together. We're going to guarantee it. If you could just show up and with a willing heart and be ready to grow. So speaking of getting ready to grow, it's time to start sleuthing and searching for the information that you will need on Saturday for this to be smooth and efficient sailing or driving as the case may be. So there is the digital organizer, that's the guts of the system. We'd like you to print out the first page of each section so that you can see the kinds of information you're going to be wanting to look for. Things like your driver's license number or your social security number, your address, the phone number for your accountant, your attorney, your doctors, the service providers that you count on to make sure the water, power and gas are working properly.

Spend a little time between now and Saturday getting those documents together and you'll have much smoother driving on event day. We're also going to be doing live office hours three times this Saturday at 9:00 AM, 12:00 noon, 2:00 PM Pacific. If you're doing this on your own schedule, tune in to the replaced in a similar time schedule on a date that works for you. But we really want to encourage you to show up live because this is something you can always put off until later. But you know what? Some crazy random thing could happen tomorrow that could have that be a decision you might soon come to regret. Decide to get in the car and go and let's go this Saturday. You will not regret it because your goal is to get to completion so that you have power, access, control and empowerment. And you'll see here that there are three. I'm ready for anything, road tripper badges, and you can use them in whatever combination to satisfy those in your party that you have achieved the goal that we set. And we just think it makes it a lot more fun to see what a superhero you can be when you get to the end of the line with this particular road trip.

Steve Juetten:

Okay, here's your shopping list between now and Saturday or whenever you're going to do this. This is what we want you to do. So first go get a document box for important papers. And in the guidebook at the back of it, we mentioned the kind of document boxes we suggest, but it's a place for you to have file folders with tabs to store those important papers, it should be stored on site. So for example you want to have appraisals, you might want to have insurance document. You certainly want to have your passport on hand. So we want a document box for all of those important papers. This is one of the items that Nancy and I found when we were doing it the first time, is it we had documents everywhere right there. They were all over the place we struggled to find those.

So we want you to have a document box where all those papers are going to end up.

This is really important. We want you to have a USB thumb drive. And why is that? Well, one of the basic premises of what we're doing with the roadmap is we want information stored off the computer and I want to say that again. We want you to store it off the computer and the reason is is that you're going to have personal information. You're going to have passwords, you're going to have the answers to security questions, you're going to have account numbers. We want all of that stored off the computer for Security and privacy reasons. We recommend that you use an encrypted thumb drive and maybe you didn't even know one of those existed, but we want you to use an encrypted thumb drive and if you don't have time to go get one between now and Saturday, that's fine, but you can order them.

They aren't very expensive. Make sure you get one that that fits with your computer, but we want it to be an encrypted thumb drive for an additional level of security. We also want to make sure that you have a notepad ready so you can keep track of all the items that require additional follow up. As much as we believe you're going to be able to get most of this done at one sitting. There are going to be some notes that you're going to take that require follow up and give you a quick example. When Nancy and I were doing ours for the very first time, we discovered that her name was not on a couple of the utility bills. Well the utility companies are not open on a Saturday when we were doing ours. So that went on our list to follow up.

Here's another one I couldn't find, believe it or not, one of the life insurance policies. And so I needed to call my life insurance person. So of course they were not available on a Saturday. So we want a notepad where you can keep track of your follow-up items. And last and not least, I want you to have some sort of a timer available so that you can work in time segments. So the one that we like an awful lot, it's a free app is called Be Focused. You can find it on your Apple app or whatever you use. And it's a way to kind of keep track of what it is that you're doing and give yourself lots of breaks. And Nancy had a comment you wanted to make on this because she really liked this part of it.

Nancy Juetten:

Well you know how when you take a road trip, there's always a kid in the car that says mom or dad, are we there yet? Are we there yet? And the truth is with any kind of road trip, whether it's an administrative road trip, like what we're talking about or a trip in the car somewhere where you're traveling, overcoming are we there yet fatigue is something that requires games and fun. So there are 16 road stops that you will be taking along this trip we're guiding you through. So set a goal to beat the clock and move through each section in 25 minutes or less. When you do that, you can give each other a high five or fist bump or you can have a dance party, you can play a game, do something fun, throw a ball for the dog, but just celebrate that you got that done fast because if you don't keep your eye on the ball, you could potentially get distracted and that could extend

your trip unnecessarily. And we want you to get to completion as soon as possible.

Steve Juetten: Finally on the shopping list. This is my favorite part actually. You want to make sure you're prepared for dashboard and dining for the road ahead and that means we want you to have beverages and snacks and a tasty midday meal so you can enjoy your trip as you go along and just like maybe you are this way. We certainly are when we take long road trips, we always have food to sustain us, things that we like to have because you're going to be taking lots of breaks and we want you to be able to snack and have things to drink and certainly have food at midday. And I don't want you going outside to do food. We want you to have food right there so you don't break the momentum very much. And lastly we want you to have champagne or whatever your favorite celebration drink is so that when you're done you can celebrate it.

Nancy Juetten: Absolutely. So Just like when you're taking a road trip, you want to assign roles. So you'll want to decide who's going to drive for the first few stops along the journey and then who's going to be the person that's going to be bringing you the documents and fetching and carrying and keeping notes about follow up. You want to change roles throughout the event so that you can learn. It could be that one or the other abuse in carrying the bulk of the load for a long, long time. And this is going to be an eye opening experience for the person who's watching to appreciate what more he or she needs to learn so that they can do not be such a passenger and being equal footed driver that gets to play the game of life.

Steve Juetten: One of the things that we discovered here is that a lot of this is about mindset and attitude and we want this to be light and fun. So don't let it devolve into being some administrative chore and we want it to be fun and we want it to be shared jointly. And so think about it in those terms. So if you're using your computer, let the other person drives some as well. And that's a key point in doing this. It's empowerment for both of you. So assigning roles is a good idea, but be flexible, right? Move back and forth.

Nancy Juetten: Yeah, just like any relationship, it's defendants wave where the magic happens. So hopefully you see by now that getting a little bit organized before the show is a good idea. So you know where things are so you can move through things fruitfully. When I will promise you, and this is the biggest possible outcome from doing this together as a family, is that you will have conversations about life and money and your wishes and your dreams and your hopes that could have been delayed for years and this could be game changing in terms of perhaps accelerating your path to retirement, changing where you live, doing things differently in your family, getting more empowered about nitty gritty matters that up until now I hadn't really been a consideration. The more you know and the more you can do on your own with equal footing, the better off everyone is going to be. We want you to make epic plans for the future and to look to the

future with confidence and just knowing that you took one day out of your life to get your act together.

It's the greatest act of love and service that you can do for your family and those that you love. We've actually done some research and people are saying that the number one thing they fear is that they might leave this planet and leave a big fat mess for somebody to clean up later. And if that is a fear that you have, just imagine that putting that fear to rest the Life Goes On Roadmap is a fear busting opportunity to get on the road and get over that so that you can look forward to even better things to come.

Steve Juetten: Wait, I have a theme song, you know the Ghostbusters theme, we could just call it, never mind. Do your best team.

Nancy Juetten: So you're going to call. So what's your big result?

Steve Juetten: It's you in the driver's seat and that's me on the right if you're looking at the picture by the way, and Nancy on the left. But the whole point is to put you in the driver's seat so that you have power, access and control of over your personal financial matters.

That's the goal that we're trying to do here and want to feel great when you're done to know that both of you can drive if need be.

Nancy Juetten: And if it's not both of you, it's your whole extended family, it's you and your best friend, it's you and your partner. It's you and your kids. Don't leave a mess behind for somebody to clean up. Show how much you love those people to make sure that all the good things are taken care of ahead of time and it can even be all the way down to who gets grandma's dining room table. If that's a table that you love and you're excited to get it, awesome sauce. If you're not excited about that dining room table, maybe it's something you can tell mom about so she can designate it for your sister to receive instead. Far better to talk about these things now while you still can then to wish that you had until it's too late.

Steve Juetten: Because the key years that we're going to be with you every step of the way, right Nancy?

Nancy Juetten: We are, so this Saturday we have a call that starts at 9:00 AM and the calling instructions are on your screen. We will have a check in call at noon, which is your signal to bring out the dashboard dining and to refuel so that you have the energy to see this thing through. And then of course we will be celebrating completion at 2:00 PM Pacific Time. And if you are one of those who are doing this on your own, simply make a note to listen to these replay calls at regular intervals throughout your own journey so that you can benefit from the questions, the aha insights, the gratitude, the appreciation-

Steve Juetten: Even the tips that we offer. Because when we go through this, we're going to be making suggestions about what other people have found helpful as they go through sections. So try to listen to the replays periodically just as if you're doing this on yourself.

Nancy Juetten: And we've got some very riveting stories from the road of life cautionary stories from the road of life that are from our own life and from the lives of families that we've touched up until now. And that makes this actually quite riveting as a participant. And so just stay tuned for that because just like you're taking a road trip and you've got a soundtrack, we've got some stories to keep you realizing the value of getting this done and we want you to appreciate that.

Steve Juetten: So before we wrap up, I just wanted to give a shout out to the professionals who may have referred you. So again, we have said there are financial planners and the state attorneys and real estate professionals and other professionals out there and we want you to circle back with them who referred you to express gratitude. This is a great gift that they've given you.

This is an opportunity for you that is a lifetime changing kind of an event. We want you to honor them with the compliment of your referrals as well. So thanks to all the licensees that have referred people here. We really appreciate it and make sure you express gratitude to them.

Nancy Juetten: Absolutely. So the road to peace of mind starts with a decision to get in the car and drive. So vroom, vroom this Saturday, we're getting it done. We're making it fun and we can't wait to help you get it done together.

Steve Juetten: Let's get this done. Thanks everybody.

Nancy Juetten: Thanks so much. If you have questions about accessing your materials, you can send me email at nancy@lifegoesonroadmap.com if you have any other kinds of questions, I'm always available in the Facebook group. Let's just get this done and make it fun and make this a day that you will never regret taking so that you can have that peace of mind that we've promised an equal footing no matter what happens next. So I'm Nancy Juetten.

Steve Juetten: And I'm Steve Juetten.

Nancy Juetten: And we thank you so much and we'll see on Saturday. Goodnight.