

YNAB Vision program

Set goals, organize finances, and become a YNABer

www.VisionFinancialSolutions.org

WHO?

YOU :-) YNAB is short for “**You** Need a Budget”: Singles. Couples. Families. Cash-strapped. Average. Wealthy. Stressed. Calm. Students. Adults. Retirees... YNAB helps everyone see finances with new lens.

WHAT?

This YNAB Vision program is a guided set-up of the YNAB software that is free for 34 days (no credit card or account syncing required). I'll be your personal financial trainer as you set goals, organize your accounts, reduce money stress, and build confidence.

HOW?

1. Complete the Get Started form and gather data
2. **MONTH 1:** We will meet in person or via video chat to get started (@2-3 hours)
 - a. **Cost: \$250** payable at end of our meeting or as arranged
 - b. Email and text support for the 34-day free YNAB trial
 - c. Weekly check-ins and end-of-month meeting
3. **YEAR 1:** Continue working with me...
 - a. Purchase a one-year subscription to YNAB (currently \$84/year)
 - b. Monthly financial training with me (\$75/month pay as you go)
 - i. Includes weekly video check-ins, email and text support
 - ii. **Total cost for original month + year support + YNAB: \$1,234**

WHERE?

We can meet online using Zoom video chat or we can meet at The Lodge in Edwardsville.

WHY?

Plan for holidays now and cross “~~organize money~~” off your 2020 resolution list early.