Sole Strivers Financial Fitness

Wealth Coaching, Life Strategy, Financial Literacy

A message from our CEO

"I find myself wanting to say "Thank you" to Sole Strivers and the mere words don't seem to express the depth of my gratitude. You've been the catalyst in changing my life on a personal, professional and financial level."

~HR Executive

One client says...

Is drama draining your dollars?

Wealth Is Built In Teams

WHAT COULD YOU DO WITH A TEAM SUPPORTING YOU?

- Reduce or eliminate your debt?
- Make and save more money?
- Transform a life that no longer fits you?
- Build a business or plan your next career moves?
- Stop procrastinating on a goal you've had for ages?

WE HELPED OUR CLIENTS ACHIEVE THESE THINGS AND MORE...

Results

Last year, our clients completed projects resulting in better financial, physical, and emotional health with net worth increases ranging from $5,000-$160,000.

View Case Studies

Get The Newsletter!

Fields marked with a * are required.

Name *

Email *

What is 2+7? *

Subscribe

How Did We Help?

WE PROVIDED...

- 1-to-1 Coaching
- Workshops
- Execution assistance
- Templates and other tools
- Help without judgement

At Sole Strivers, we **A.R.E.** your wealth building partners, providing...

Accountability
Resources
Execution Assistance

Client Testimonials

The financial mentorship afforded me the opportunity to identify patterns in my spending/decision making. Diony has been instrumental in more ways than I could imagine. Her wisdom, commitment and professionalism has attributed to change in my spending habits."

— Executive Assistant

Get The DIY Workbook

An easy-to-follow action plan to help you turn your dreams to realities.

Look Inside

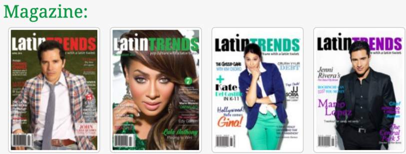
Options

PDF only $19.99 USD

Buy Now

START NOW! Contact us at 646-337-8439 to make an appointment.

See our financial advice in Latin Trends Magazine:



View The Articles >>

We've also appeared in:

nv | WHCR 90.3 FM | DiversityInc

Recent Articles

- Can't Find Your Passion? Ask Different Questions!
- Budgeting Problems. All In Your Mind?
- Action! Maintaining Momentum
- Don't Be Scared, Big Bird! Be Prepared. Part 2
- Don't Be Scared, Big Bird! Be Prepared. Part 1
- Big Dreams Are Possible! Research Your Goals!
- Back On Track: Managing Your Team
- Wealthy Talk: Finding A Mentor and Learning About Stocks
- SAVE $10,000 In 6 Steps

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usatoday.com

Aug 27, 2018

Sole Strivers
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Top 5 Tips To Build Your NET WORTH

- Spend time each week thinking about and executing plans to make money.
- Work with others to economize and build wealth.
- Make money from all of your skills (legally, of course)
- Know the events or feelings that trigger your desire to spend money
- Know the top 5 things you love about yourself

Top 5 Thoughts That Hold You Back

- Life should always be fair.
- If you were meant to be financially secure, you would have been born into a wealthy family.
- You deserve luxuries TODAY, even if you must pay by credit card.
- Embarrassment should be avoided at all costs—you don't want people talking about you.
- Wealthy people are greedy and/or evil.

Wealth = Health + Happiness + Cash + Income Producing Assets

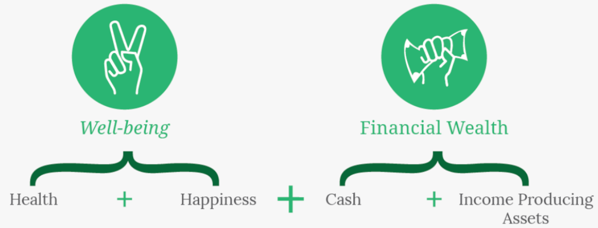
Sole Strivers Financial Fitness

Wealth Coaching, Life Strategy, Financial Literacy

About

The Company

Sole Strivers is a wealth building consultancy. We help clients save money, make money, repay debt, and plan and execute other projects that increase their wealth. We define wealth as:



Typical Projects

Typical projects range from debt reduction and savings plans to career explorations and business expansions.

Sole Strivers Difference

We understand that personal finance and real life are interconnected. Our holistic coaching process includes a combination of life, financial, business, and career coaching.

We also provide execution assistance. If a client is unable to complete a project related task, we help or do it for them. Most of the time the tasks are what you'd expect from goal attainment support like updating a project plan. But some of the assistance we've provided may surprise you. Take a look.

CLIENT RESULTS

Last year our clients working on financial wealth projects:

- Increased their net worths from $5,000 to $70,000;
- Reduced debt 20- 60%;
- Increased business revenues an average of 30%
- Received job promotions
- Organized their financial records
- Hired (or better utilized) wealth teams (e.g. lawyers, CPAs, CFPs)
- Our clients working on well-being related projects achieved goals like:
- Making more time for family and hobbies
- Reducing drama in their lives
- Becoming more comfortable networkers and public speakers

The Team

Our clients are the most important members of the team.

All the success stories appearing on this site were possible because of our clients' willingness to make changes, work on their projects consistently, and persevere in good times and bad. Most importantly, our clients have been willing to brave discomfort as they completed necessary steps.

They put their trust in our experience and support. And their results make us proud.

Dionisia Cespedes, MBA Founder

Diony Cespedes, MBA, is a financial coach and business strategist who defines wealth as Health + Happiness + Cash + Income Producing Assets. She built Sole Strivers, LLC, a wealth building consultancy, to help clients achieve goals related to financial wealth and well-being.

Diony has more than 15 years of corporate and start-up experience, playing lead roles in over 160 projects with budgets ranging from $10,000 to $100 million. She has created and or executed strategies large organizations including: ABN AMRO Bank, Rothschild Advisors, Warner Music Group, Aetna, and the State University of New York.

Diony is also a personal finance columnist for Latin Trends Magazine and the author of *Make Your Dreams Happen—5 Steps to Turn Your Dreams into Realities*.

An advocate for small businesses, Diony is an entrepreneur in residence at the National Minority Business Council, providing marketing and finance consulting to member businesses in support of the organization's efforts to help its members succeed and expand.

Diony earned a dual Bachelor of Arts degree in Psychology and Marketing from the State University of New York at Plattsburgh, a certificate in Finance from Baruch College, and an MBA from Howard University where she was a Howard University Trustee Scholar. She is literate in French and Spanish.

Sole Strivers Network

A nationwide group of independent contractors and small business owners who help our clients execute their plans. They include: certified financial planners, lawyers, educators, graphic designers, cleaners, baby sitters, virtual assistants, organizers, caterers, business consultants and the list grows daily. Each client has different needs.

Featured Network Members

Nzengha Waseme, Esq.

Nzengha Waseme is an accomplished attorney with a strong background in business law, contracts and litigation. She is set apart, not only by her name, but also by the unusual path she took in establishing herself in her legal career. Her first passion was in the area of science and she obtained a BS in the challenging field of Biochemistry.

While pursuing her Masters degree in Environmental Toxicology she served as an Environmental Lobbyist with the Illinois Environmental Counsel, and thereafter as a Legislative Reporter, her love for science met the world of "policy." She discovered that, rather than be confined to a lab, she could affect change in a career that married the two.

Working with scientists, Ms. Waseme learned that many were not properly patenting their work and consequently not receiving royalties. This troubled her. While in law school, serving as assistant to General Counsel for the Michigan Federation, she saw a similar pattern among non-profit organizations and businesses. Further research revealed the same problem among inventors and innovators, including actors, writers and recording artists. These observations and the kinship she feels with creative people, defined her own particular direction as an attorney.

In 2007, Ms. Waseme took the leap to manifest her dream, owning a business with the sole purpose of protecting and fertilizing "dream seeds". Her central mission is to act as a conscientious legal advisor and advocate for entrepreneurs and emerging businesses across all industries, but particularly, in the worlds of music, entertainment, the visual arts, publishing, science and technology. She is often heard saying "Your passion is my passion. Anyway I can help someone reach that next goal, I'm there. That's what feeds my soul."

In her life outside of the firm, Ms. Waseme finds fulfillment serving on the boards of community organizations such as Bedstuy Legal Services Corp., and others that provide legal services for low-income families, domestic violence shelters as well as assist in rescuing girls from sex trafficking. Ms. Waseme also serves on the advisory committee of World of Money, an organization with the sole purpose of teaching entrepreneurship, wealth-building and financial literacy to youth in the metro area.

After years spent guiding budding authors, Ms. Waseme is currently flexing her writing muscle by co-authoring a book with her pre-teen daughter, Malala, as well as working on a book for the Chicken Soup Series.

The Accela Group, LLC ("Accela") is a management consulting and strategic advisory firm that assists small and medium sized businesses to run their enterprises with wealth creation in mind. Accela was developed out of a twenty-year history in strategic business management, financial advisory and venture capital services to emerging companies.

Accela works with business owners who are committed to growth and helps them to focus on the strategic execution of growth plans by utilizing the disciplines of well-run companies. The core of Accela's service offering includes mergers and acquisitions and strategic growth advisory services. Accela's mergers and acquisition practice assists owners to buy, sell or merge companies along with providing guidance to source debt and equity growth capital.

Accela's strategic growth advisory services include strategic planning and LEAD advisory services. The LEAD advisory service is designed to provide the structure for entrepreneurs to focus on in the running of their companies. On a monthly basis, we assist in the execution of strategic plans, monitor financial performance and provide solutions to address immediate issues that move our clients' businesses forward.

Industry practice areas include: professional services; hospitality and food service; beauty and hair care. We work alongside key strategic partners to provide additional services such as web and development, corporate branding and intellectual property strategy and protection. Our website is www.theaccelagroup.com.

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D.R.E.A.M. Goal Attainment System

What is The D.R.E.A.M. Goal Attainment System?

The D.R.E.A.M. Goal Attainment System (D.R.E.A.M.) is a tool to help you turn your dreams into realities. With D.R.E.A.M. you can:

- Turn big dreams into achievable yearly, monthly, weekly, and daily goals. A goal is a dream with a deadline and a plan.
- Make progress on your goals in a few 20 minute sessions during the week and two to three hours on your day off.
- Find information about any topic including funding.
- Build and utilize teams inexpensively.
- Examine “impossible” dreams to identify possible parts.

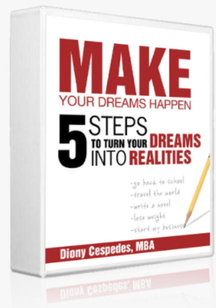
WHAT DOES D.R.E.A.M. STAND FOR?

- **D**ream big: List what you’d like to accomplish in the next 5 years. Include “silly” and “impossible” dreams.
- **R**esearch: Learn the steps to achieve each dream you identified.
- **E**valuate: Use self knowledge and research to decide which goals to pursue.
- **A**ct: Create task lists with deadlines, build a team, integrate tasks into daily life and complete them.
- **M**easure: Keep track of your progress using milestones.

HOW IS D.R.E.A.M DIFFERENT THAN OTHER SYSTEMS?

D.R.E.A.M. relies on a magic ingredient: your input. You customize it to work based on your self-knowledge.

Make Your DREAMS Happen Workbook



Get the Workbook

Options

PDF only $19.99 USD

Buy Now

Take a Sneak Peek

> *Make Your Dreams Happen is the first book that makes goal achievement simple. Its practical and people-friendly steps will make your goals come to fruition. Wait until you get this book in your hands and you will experience what I've experienced."*

— K.J.,PhD, Behavioral Health Clinician

> *"This book is a blessing. Over the past year, I've found myself very busy, too busy to read most times. This book not only has 5 steps which fits perfectly in my limited free time, but it's also easy to follow. Diony makes planning and achieving your goals fun and easy. Since reading the book I've been more productive, working smarter not harder. I've come out of my comfort zone and challenged myself to try new things."*

— A.R., Small Business Owner

Wealth = Health + Happiness + Cash + Income Producing Assets

Coaching

Sole Strivers Coaching Can Help You:

- Discover the link between your daily decisions and your net worth
- Recognize and change habits that are harmful to your wealth
- Identify and complete the steps necessary to reach your dreams

Our clients' success stories offer a snapshot of what we've helped clients accomplish.

WHAT WOULD YOU LIKE TO DO?

- Increase your net worth?
- Reduce or eliminate debt?
- Know where your money goes?
- Improve your earning, saving, spending, and or investing habits?
- Plan a comfortable retirement?
- Reach a goal you've been too busy *(or afraid)* to attempt?
- Make time for yourself and loved ones?
- Help others without harming your financial health?
- Build and or manage a side business?
- Plan and execute your next career move?

TELL US DURING A 1 HOUR INTRODUCTORY SESSION.

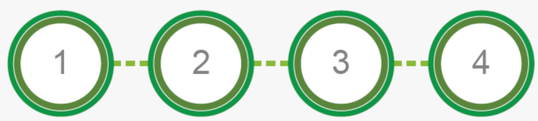
A lot can happen in 1 hour. We can:

- Discuss your life and define immediate and long term goals
- Determine how the D.R.E.A.M. Goal Attainment System applies to your goals
- Brainstorm about areas to research and tasks to complete
- Recommend resources (books, classes, programs)

At the end of the session, you will have a great head start on your goal!

Investment: $199 purchased separately. Included in Wealth Building Project.

> *"Sole Strivers not only provided the opportunity for me to set clear and measurable career and financial goals, but also inspired me to ask the question: "What do I want for my life?" and to create my own definition of success-a definition that encompasses all aspects of living a fulfilling life, including goals in the areas of wealth, health and personal growth. Sole Strivers also provided the critical tools to help me execute successfully."*
>
> — S.B., Operations Manager



Our Coaching Program — A Four Stage Process

To reach your dreams you'll need: a detailed vision, time to work on your project, and the ability to concentrate. Financial problems are a major distraction. That's why every Wealth Building Project begins with Envisioning, Time Maker, and Financial Check-up sessions. We also offer the services a-la-carte. Income-based payment plans and discounts are available for Jump Start Program graduates.

Stage I
Envisioning

The more specific your vision, the easier it is to make it a reality. Together we'll…

- Define and prioritize your goals
- Review the benefits and disadvantages of your current situation
- Brainstorm about the tasks and resources needed to complete your goal
- Turn discussion notes into a project plan

Investment: Included in Wealth Building Project. $599 purchased separately

Stage II
Time Maker

You need time to work on your goal. This package helps you to understand your current use of time and make time to work on your goal.

- Begin prioritizing activities
- Identify activities that can be delegated or eliminated without adverse effects on your career or relationship
- Find at least 5 hours per week to work on your goal
- Receive time management tools and templates

Investment: Included in Wealth Building Project. $599 purchased separately.

Stage III
Financial Check-up

What is your net worth today? How are you spending, saving, and investing your money? How much does your desired lifestyle cost? Your coach will help you answer these questions and more in preparation for work on your wealth increasing project.

TOGETHER WE'LL:

- Calculate your net worth.
- Brainstorm about ways to increase and protect your net worth
- Discuss your lifestyle and retirement goals
- Update your budget to support your goals (or create a budget)
- Identify harmful and helpful money habits
- Identify potential next steps

Please bring a list of all of your expenses.
Can't find your financial documents and accounts? **Our financial clean-up service can help.**

Investment: Included in full coaching packages focused on financial organization and debt reduction. $999 purchased separately.

OPTIONAL: Financial Clean-Up Service

Stage IV
Wealth Building Project

Each coaching engagement is customized to help you reach your goal.
The process features our D.R.E.A.M. Goal Attainment System.

A TYPICAL SESSION INCLUDES:

- 16-24 Coaching calls (45 minutes-1 hour)
- Accountability texts between meetings
- Assistance building a team
- Assistance finding, vetting, and choosing necessary professionals (e.g. lawyer, CPA, CFP)
- Execution Assistance

Packages start at $3000 per session. Payment plans and scholarships are available.

Workshops

Start Now! 6-Week Jump Start Programs

New classes start each month.

D.R.E.A.M. Start

This six week program introduces the Sole Strivers D.R.E.A.M. process used to guide clients on the path to reaching their goals. D.R.E.A.M. stands for **D**ream big, **R**esearch, **E**valuate, **A**ct and **M**easure.

PROGRAM INCLUDES:

- Make Your Dreams Happen-5 Steps to turn your dreams into realities (workbook).
- 6 calls, each highlighting a step in the process (1 per week).
- Access to recorded calls (no worries about missing calls).
- Friday evening and Saturday morning classes available.

Investment: $499.00. Payment plans are available.

> *This workshop was really helpful for me especially to start the year off with. It made me realize that it is possible to make progress in anything as long as you have a plan and make a decision to execute it. I definitely felt this workshop has a great framework for becoming successful in all areas of my life.*

— Nicole M., participant in the
Make Your Dreams Happen workshop

Financial Fitness Boot Camp

This program will provide the tools you need to begin your wealth building project

PROGRAM INCLUDES:

- Make Your Dreams Happen-5 Steps to turn your dreams into realities (workbook).
- 6 calls, each highlighting a step in the process (1 per week).
  - Getting Started — defining wealth, setting goals.
  - Budgeting — figuring out how much you're earning and spending.
  - Money Habits — identifying helpful and harmful habits.
  - Planning – saving and debt repayment plans
  - Retirement — determining how much you'll need.
  - Protecting Your Wealth (insurance, time management, new habit protection).
- Access to recorded calls (no worries about missing calls).
- Friday evening and Saturday morning classes available.

Investment: $499.00. Payment plans are available.

Wealth = Health + Happiness + Cash + Income Producing Assets

Speaking Engagements

We present a variety of wealth building topics from goal attainment to net-working and budgeting. We'll customize the presentation content to fit your organization's goals.

Each topic can be delivered as a keynote presentation, lunchtime roundtable discussion, or multi-hour workshop in which attendees can practice applying the wealth building skills covered.

Each presentation includes: a pre-planning session with the Sole Strivers presenter and learning materials for the attendees. Follow-up sessions and on-site coaching days are also available upon request. Below are sample topics.

Keep Your Millions: Tiny Changes, Big Results

After taxes, most of us will earn between $750,000 and $2,500,000 over a 40-year career. This doesn't include investment returns. Those are extra. So why are so few of us millionaires at retirement? Could it be our: hairstyles? movie choices? kitchen tables? use of debt? In this seminar, we'll discuss the effect of seemingly small decisions on our net worth. Attendees will walk away with tips to identify "money leaks" and save, at least, $500 per year.

From D.R.E.A.M. To Reality

Work, school, family, charity, social life, daily chores…We're busy! Day-to-day responsibilities can distract us from pursuing our longer term goals. This seminar will introduce Sole Strivers' D.R.E.A.M. method of goal attainment and provide recent examples of how it works.

WE'LL COVER:

- Turning big dreams into small projects
- Getting free and low cost help
- Staying focused

Being an Asset to Your Network

Being of service to your network can turn your stack of business cards into a network of people who are committed to helping you achieve your goals.

IN THIS WORKSHOP, WE'LL COVER:

- introducing yourself in 45 seconds or less;
- targeted listening to identify ways to help others; and
- categorizing and leveraging your network

After the presentation, you will practice your skills in a guided 'speed networking' exercise.
Attendees will gain the ability to strengthen their network and network-ing skills.

Helping Others, Protecting Yourself

Has someone asked you for help lately? This seminar will provide tips for helping others while protecting your net worth.

WE'LL COVER:

- Determining what you can afford to give
- Building and adhering to a "helping others budget"
- Distinguishing between requests for "wants" and "needs"
- Finding alternative sources of help for loved ones whose needs are larger than you can afford to handle on your own
- Managing survivor guilt
- Handling requests from organizations and strangers

Press Photo

"Diony is an excellent speaker and makes you see the bigger picture. She does not sugar-coat anything and is true to her word."

— participant,
Make Your Dreams Happen Workshop

We've presented at events hosted by:

Baruch College
Black Public Relations Society
Fannie Mae
First Corinthian Baptist Church
Misunderstood Youth Development Center
National Minority Business Council
Rising Affluent
The Women's Collaborative
Western Union & USAID

send press inquiries to press@solestrivers.com

"When I think of Diony, I think of of style and substance, the style got my attention and the substance earned my respect. I refer to her as my financial fitness guru, and am blessed to have her as a part of the NMBC Global team. Whether it is sharing her knowledge and experience with an aspiring en-trepreneur or a seasoned pro, Diony gets the message across in a meaningful way. A very valuable professional to our or-ganization and community."

— Fritz-Earle S. McLymont, Managing Director, NMBC Global

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Money Talks

You work together, play together, and may even pray together. Why not build wealth together?

Money talks are coach-guided group discussions about a particular goal with people you invite.

TOPICS HAVE INCLUDED:

- Exploring business ideas
- Planning care for elder loved ones
- Debt reduction
- Career planning
- Life event planning—(e.g, marriage, inheritances, moves, divorces)

EACH MONEY TALK INCLUDES:

- Introduction to D.R.E.A.M. goal attainment process
- Brainstorming discussion facilitated by a Sole Strivers coach
- Templates for turning meeting notes into a project plan
- Reviews of the project plan documents you create*
- 30-minute accountability calls between the Sole Strivers coach and group leader

Investment: Sessions start at $599 for a 3 hour session.
**We can create a project plan for you for an additional cost.*

Wealthy Weekend and Wealthy Weeks

Want an entire weekend or week to brainstorm with your group? Contact us!

We offer longer strategy sessions that include customized tools and activities to help you discuss your goal.
We can do sessions in our offices and remotely via conference calls.

GOING ON VACATION? INVITE US! WE'LL TRAVEL.

> *"After working with Sole Strivers and going through the 5-step process, I have a renewed sense of confidence in being able to create a vision for my life and future while adopting a fresh perspective on all of the aspects that impact the vision. Sole Strivers' method challenges you to think in new ways, inspires you to dream bigger, and empowers your personal and professional growth. I highly recommend the program to anyone desiring more for your life... it works!"*

— BCS, Merchandise Planner

The Perfect Season for WEALTHY TALK
Read the Article

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Millennial Money

Save your money for a rainy day! Stay in school! Invest! All great advice, but incomplete.

- How much should you save?
- How can you save if you don't make a lot of money?
- What type of investments do people make?

Inspired by questions asked by the millennials on our team, we've created products to answer these questions and many more.

Money Meeting–Personal Q&A

Four 1-to-1 meetings in which you can ask questions about building wealth. Together we'll find answers that apply in your case and build a customized wealth action plan for you. Money meetings make great graduation gifts!

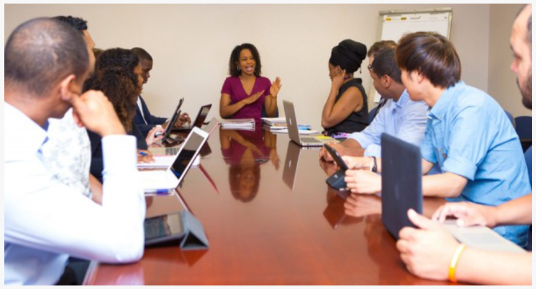
Investment: $499

Wealth Lessons: A six week class

6 Week Program Includes:

- 6 calls, each highlighting a topic below
  - Creating a budget
  - Learning about investing
  - Debt repayment/ Managing credit
  - Career, business, and life planning
  - Building a wealth team
  - Finding free and low cost ways to enjoy your favorite things
- Access to recorded calls (no worries about missing calls)
- Friday evening and Saturday morning classes available

Investment: $599



"I think that this is great for people our age [20's] because most of us do not know what we're doing with our money"

— S. Joseph

"I've learnt that investments are key to building wealth. Also to have plans on what I need to do to gain the money I'm aiming to earn. Having a financial plan is key to earning money. My aim is to start earning capital as of next month and have invested in a property as of next year"

— S. Clark

Sole Strivers Financial Fitness

Wealth Coaching, Life Strategy, Financial Literacy

Contact

Your Name (required)

Your Email (required)

Subject

Your Message

Your Goal (optional)

Tell Us About Your Goal

Send

Sole Strivers

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Success Stories

[testimonialswidget_widget]

Money Management/Debt Repayment

Situation:

Despite earning in excess of $60k per year, client had been unable to save more than $300 per month. She had debt and other responsibilities equal to approximately one year's salary.

What we did:

Reviewed her spending with her each pay period. Helped her calculate credit card repayments. Shared the Sole Strivers credit card repayment strategy with her. We also helped her find free and low cost alternatives to her favorite products and services.

Result:

She reduced spending on nonessential items by 65%. And within 8 months, she built a modest emergency fund and paid off 33% of her debt, while still covering her basic expenses. (How? Overtime and side hustles).

Long term effect:

She now uses budgets as tools to build her financial future. She feels empowered to control her financial destiny and sleeps well at night.

Business Growth

Situation:

A client came to us in January of 2014 with a part-time job and a two-person consultancy. Her goal was to gain new business and hire employees (or contractors), however she hesitated to solicit new business because she worried about being able to handle the workload. She was reluctant to hire employees, fearing she'd be unable to pay them on a timely basis.

What we did:

We helped her understand her cash flow, better leverage her book keeper, identify roles and tasks for contractors, and we encouraged her to purchase some business equipment funded by her part-time job.

Result:

The equipment purchase paid for itself in less than a month. By March 2014, she quadrupled her business revenues and hired one contractor. By late April 2014, she was able to hire 2 additional contractors. By June 2014, her business revenues septupled (7x) and she was able to take a summer vacation/slowdown during which her business still earned triple what it was earning in January 2014.

Career Transformation

Situation:

The client was an executive assistant with two decades of experience who had recently graduated from college with honors. She wanted help resigning from her job because she had outgrown her current role and was eager to be an entrepreneur. At the time we met, her business had sold two items.

What we did:

We learned the client would be interested in a more challenging role, but hadn't asked for one. We helped craft a job description for her ideal job and coached her through discussions with her current employer. Because she was an excellent employee, her employers met her proposal with enthusiasm. During a six week negotiation, we helped the client build a support team including lawyers, a CPA, and job mentors who had held roles similar to the one being proposed. For her business, we began building a network of potential clients and suppliers. While she worked at her existing job, we attended conferences and meetings to help build the foundation she would need for a strong business.

Result:

The client accepted the new role, nearly doubling her original compensation. More importantly, the promotion was her first management role and international assignment. She hasn't abandoned her entrepreneurial dreams, however. She continues to create products from her new home and now has time and money to build a strong foundation for her business.

Wealth Coaching / Public Speaking

Situation:

Client was an aspiring entrepreneur who feared public speaking and felt uncomfortable in networking events.

What we did:

We provided an elevator pitch, talking points, and plenty of opportunities to attend networking events and practice. At the beginning of her journey, a Sole Striver coach attended networking events with the client until she became comfortable.

Result:

Client now attends several events per month. She feels more comfortable and confident and can clearly promote her business ideas and goals within 60 seconds.

NB: *Public speaking and networking are major wealth building skills.*

Changing Spending Habits

Situation:

Client was having difficulty paying essential bills and falling behind on loan repayments. She was living check-to-check despite earning over 80k. She also took multiple vacations per year-each without a budget.

What we did:

We analyzed her spending, identifying small and large changes she could make to improve her financial condition. The most impactful change she could make was moving to a more affordable apartment. We also showed her how quickly her credit card debt was growing.

Result:

After about 14 weeks of encouragement (a few gentle reminders and a spirited conversation or two), she decided to move to a more affordable apartment and made other changes we recommended. Within seven months, she moved, saving $10,000 per year. The total impact of all the changes was more than $30,000.

Long term result- She makes better financial decisions. She was able to focus on career goals instead of financial problems, resulting in two raises to date.

Financial Organization / Building Net Worth

Situation:

Client had a demanding, six figure job, worked 60-70 hour weeks and had little time to think about his finances. As a result of having worked at multiple companies throughout his career, he had several retirement accounts, stock options, and other assets linked to each former employer.

He came to us after having lost a five figure stock option opportunity because he was too busy to return a confirmation email.

What we did:

We helped him build a financial team that included a Certified Financial Planner and an Estate lawyer. We also helped him calculate his net worth, establish financial goals, and research post-retirement entrepreneurial options.

Result:

He now knows his net worth, has peace of mind about his finances and new financial team and can refocus on his career and post retirement entrepreneurial dreams.

Family Coaching

Situation:

Client was among the most academically and financially successful persons in his family. He had, over the years, taken on responsibility for supporting several family members in multiple households. Despite having adult siblings, he was also most responsible for his elderly parents' needs. He came to us because the time and financial demands were interfering with his personal and professional life.

What we did:

We mapped out his current responsibilities, helped him identify alternatives, and created a Sole Strivers friends and family budget for him. We also coached some family members on financial budgeting and time management and found community-based support to help others.

Result:

He now spends less money and time managing his extended family's affairs and more time enjoying their company. He is free to focus on building his career including traveling for work. And he has time to date, which was impossible before.

Time Management / Finding Time to Build a Side Hustle

Situation:

Client dreamed of building an event planning business. Although her day job required only 40 hours per week, she found no time for researching and pursuing her event planning goal. At our consultation meeting, she told our coach that she was single and had no other responsibilities.

What we did:

We asked her to keep a time diary—the same one that appears in our book Make Your Dreams Happen: 5 Steps to Turn Your Dreams into Realities. Upon discovering that she spent 15-25 hours in church every week involved in activities unrelated to her career goals, we suggested that she share her event planning skills with her church. She quit activities where she wouldn't be missed (e.g., choir) and led committees to produce church events. Next we uncovered a few opportunities for her to assist in event planning for her employer, helped her create talking points to broach the subject with her boss, and were available to her a for a quick practice run minutes before she presented her ideas. Lastly, we helped her find and set up informational interviews with full time event planners to learn more about the business.

Result:

Client is now the "go-to" person for events. She receives requests from her employer, church, and friends and family. She is steadily building the experience and skills necessary to create a strong event planning business in the future. And she was able to do it all while fulfilling her faith based objectives.

Business Consulting

Situation:

Client had a business idea and business cards, but few customers. She also had a full time job.

What we did:

We helped her define a target market, identify clients from her existing social and entrepreneurial networks, provided negotiation talking points and strategies for her first deals.

Result:

Within 50 days, she negotiated her first contract for an amount equal to 26% of her full time salary. She cashed a deposit check worth 8.6% of her salary within a month of working with us.

Financial Organization

Situation:

A couple came to us wishing to "organize [their] financial affairs". During the first consultation, we discovered that the 7 figure-net-worth couple had outgrown their financial team and needed to update their financial plans to reflect the attainment of certain financial goals and establish new ones.

What we did:

Helped them identify necessary financial professionals (i.e., researching, interviewing). Helped them get the most of their existing financial team. Created negotiation and cold call scripts for a business expansion they were planning. Reviewed documents related to business expansion.

Result:

Couple has a strong financial team; a clear sense of net worth; better cost control; a stronger retirement plan; and better understanding of their business and personal cash flow.