

ESCAPE THE BROKE UPPER CLASS, SUPERCHARGE
YOUR LUCK, AND TRANSFORM YOURSELF FROM
KNOWLEDGE WORKER TO INDUSTRY TITAN

MEGAWEALTH



EMMY SOBIESKI

WORKBOOK

Design Your MegaWealth Plan

This PDF Workbook will guide you to:

1. Draft your money flywheel
2. Define your career path in the 3Bs framework
3. Decide which roadblocks you need to remove
4. Design your personal your MegaWealth Plan.

As explained in Chapter 12-14 of MegaWealth, this is a step-by step process. This PDF workbook helps you keep all your answers organized in one place, so that in the end, you have an amazing document to refer to and your very own MegaWealth Plan.

This workbook also contains excerpts from the MegaWealth book, so you have context.

The best way to work with this PDF is:

1. Before reading Chapters 12-14, Print or Download the MegaWealth PDF Workbook.
2. Google instructions for accessing the accompanying PDF from the version you purchased (Amazon: Kindle, Audible, Paperback, Hardcover) or download a copy at www.emmysobieski.com
3. Read each chapter with the workbook by your side, answering questions and filling it out as you go along.
4. Don't worry if you don't have all the answers. I don't expect you to. This is meant to be a living document. Start with your best ideas, then keep adding to them over time. Remember, most people don't have a plan at all. You are already ahead!

From Chapter 7: How to pick the right industry, company, and timing on your MegaWealth path.

Choosing the Right Industry for building wealth

An industry that can support your wealth generation should possess certain characteristics:

1. An industry should be large and growing faster than GDP (perhaps 5-10% plus per year). Super-fast growth (50-100%+) will not be sustainable over more than a few years, or are too small. That's math.

Write down 2-5 target industries, and research their potential growth rates:

Industry #1 and growth rate: _____
Industry #2 and growth rate: _____
Industry #3 and growth rate: _____
Industry #4 and growth rate: _____
Industry #5 and growth rate: _____

2. An industry should score well on Michael Porter's 5 forces, which is similar to what Warren Buffett calls a moat. The industry should have:

1. Good barriers to entry (not too competitive)

Industry #1 Entry Barriers: _____
Industry #2 Entry Barriers: _____
Industry #3 Entry Barriers: _____
Industry #4 Entry Barriers: _____
Industry #5 Entry Barriers: _____

2. Low concentration (thus bargaining power) of buyers

Industry #1 Buyer Power: _____
Industry #2 Buyer Power: _____
Industry #3 Buyer Power: _____
Industry #4 Buyer Power: _____
Industry #5 Buyer Power: _____

3. Easy barriers to exit (thus no irrational competitors who can't leave)

Industry #1 Exit Barriers: _____
Industry #2 Exit Barriers: _____
Industry #3 Exit Barriers: _____
Industry #4 Exit Barriers: _____
Industry #5 Exit Barriers: _____

4. Low bargaining power of suppliers, so costs are reasonable.

Industry #1 Supplier Power: _____

Industry #2 Supplier Power: _____

Industry #3 Supplier Power: _____

Industry #4 Supplier Power: _____

Industry #5 Supplier Power: _____

5. Low threat of new substitutes because what this industry creates is hard to replace with other items.

Industry #1 Substitute Threat: _____

Industry #2 Substitute Threat: _____

Industry #3 Substitute Threat: _____

Industry #4 Substitute Threat: _____

Industry #5 Substitute Threat: _____

3. An industry should possess 3 elements my billionaire bosses looked for prior to investing: Catalyst, Timeliness, and Sustainability.

1. There is a catalyst that created a positive change, increasing the industry's growth rate (higher demand or need, regulation, buying patterns)

Industry #1 Positive Catalyst: _____

Industry #2 Positive Catalyst: _____

Industry #3 Positive Catalyst: _____

Industry #4 Positive Catalyst: _____

Industry #5 Positive Catalyst: _____

2. That positive change is timely, i.e. it is both happening soon and people are starting to recognize that it's happening.

Industry #1 Timely & Visible? _____

Industry #2 Timely & Visible? _____

Industry #3 Timely & Visible? _____

Industry #4 Timely & Visible? _____

Industry #5 Timely & Visible? _____

3. The positive change is sustainable over 5+ years. This is especially critical when you are choosing what industry to join for your career.

Industry #1 Sustainability: _____

Industry #2 Sustainability: _____

Industry #3 Sustainability: _____

Industry #4 Sustainability: _____

Industry #5 Sustainability: _____

Choosing the Right Company

The right industry is like a fast-flowing river with lots of water. The right company is able to travel down the river faster than other boats. A company that can support your wealth generation should possess certain characteristics:

- A. A company should be large and growing faster than GDP (perhaps 20-40% plus per year). Super-fast growth (50-100%+) will not be sustainable over more than a few years, or are too small.

Write down 5 target companies, and research their potential growth rates:

Company #1 and growth rate: _____

Company #2 and growth rate: _____

Company #3 and growth rate: _____

Company #4 and growth rate: _____

Company #5 and growth rate: _____

- B. A company should score well on Michael Porter's 5 forces, which is very similar to what Warren Buffett calls a moat:

1. It has good competitive moat

Company #1 Moat: _____

Company #2 Moat: _____

Company #3 Moat: _____

Company #4 Moat: _____

Company #5 Moat: _____

2. It has low concentration (thus bargaining power) of buyers

Company #1 Buyer Power: _____

Company #2 Buyer Power: _____

Company #3 Buyer Power: _____

Company #4 Buyer Power: _____

Company #5 Buyer Power: _____

3. It has no irrational competitors who can't leave

Company #1 Rational Comp: _____

Company #2 Rational Comp: _____

Company #3 Rational Comp: _____

Company #4 Rational Comp: _____

Company #5 Rational Comp: _____

4. It has low bargaining power of suppliers, so your company won't get killed on costs.

- Company #1 Supplier Power:** _____
- Company #2 Supplier Power:** _____
- Company #3 Supplier Power:** _____
- Company #4 Supplier Power:** _____
- Company #5 Supplier Power:** _____

5. It has low threat of new substitutes because what this industry creates is hard to replace with other items.

- Company #1 Substitute Threat:** _____
- Company #2 Substitute Threat:** _____
- Company #3 Substitute Threat:** _____
- Company #4 Substitute Threat:** _____
- Company #5 Substitute Threat:** _____

A company should possess 3 elements my billionaire bosses looked for prior to investing: Catalyst, Timeliness, and Sustainability.

1 There is a catalyst that created a positive change, increasing the company's growth rate (higher demand or need, regulation, buying patterns)

- Company #1 Positive Catalyst:** _____
- Company #2 Positive Catalyst:** _____
- Company #3 Positive Catalyst:** _____
- Company #4 Positive Catalyst:** _____
- Company #5 Positive Catalyst:** _____

2 Is that positive change timely? Is it both happening soon and people are starting to recognize that it's happening?

- Company #1 Timely & Visible?** _____
- Company #1 Timely & Visible?** _____
- Company #1 Timely & Visible?** _____
- Company #1 Timely & Visible?** _____
- Company #1 Timely & Visible?** _____

3 The positive change is sustainable over 5+ years. This is especially critical when you are choosing what company to join for your career.

- Company #1 Sustainability:** _____
- Company #2 Sustainability:** _____
- Company #3 Sustainability:** _____

Company #4 Sustainability: _____
Company #4 Sustainability: _____

Hurdle #3 Choosing the Right Timing

The right timing breaks down to several factors.

1. Economic Cycle Timing - where are we in the growth of the economy? Early or late stages of expansion? Entering a recession? Exiting a recession? Be careful not to constantly predict a recession and miss out on taking action and being a part of exciting industry growth. It's proven human nature to prioritize avoiding risk, and as such we are drawn to pulling out early and forecasting doom.

Write a few sentences on where you think we are in the economic cycle, including where you could be wrong to the upside and the downside:

2. Industry Timing - is it early, but not too early, in the industry's growth? Early enough that there is plenty of growth, not too much competition, and an opportunity for you to become influential in the industry. Not too early so that there isn't steady growth, investors come in and out without full commitment, and the future isn't too clear yet.

Write a few sentences on where you think we are in the industry timing for each industry you chose, including where you could be wrong to the upside and the downside:

3. Company Timing - is it early, but not too early, in the company's growth? Early enough that there is plenty of growth, not too much competition, and an opportunity for you to become influential in the company. Not too early so that there isn't steady growth, investors come in and out without full commitment, and the future isn't too clear yet.

Write a few sentences on where you think we are in the company timing for each company you chose, including where you could be wrong to the upside and the downside:

4. Career Timing

Write a few sentences on the following topics:

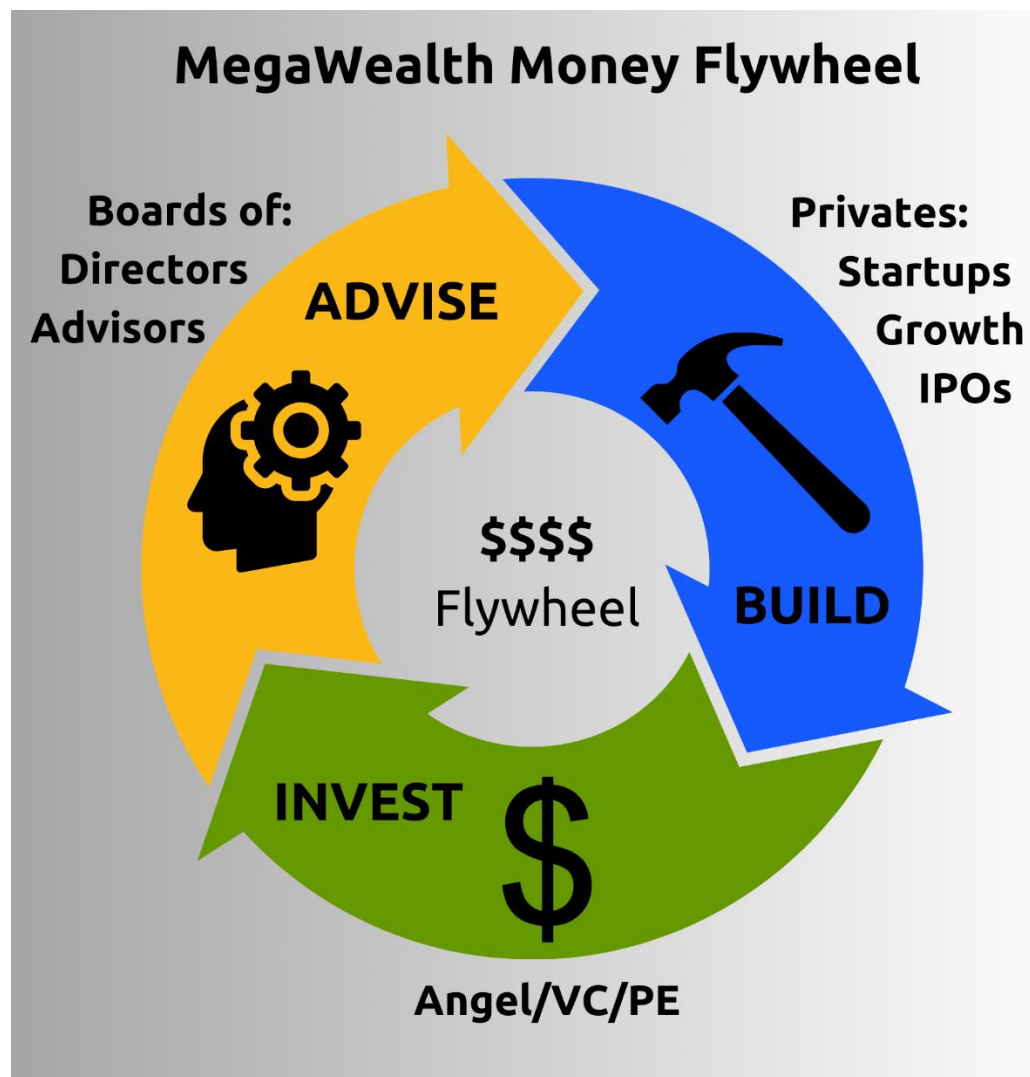
- **Have you spent enough time in the Breaking In phase in order to show your contributions and be offered a role at a high-quality private company?**
- **Does your own timing match up well with the industry and company timing above, or do you need a bit more time in Breaking In to attract higher caliber private company interest by building your accomplishments and/or skill set?**
- **Include where you could be wrong to the upside and the downside:**

Now review your answers from this section to select the best industry, companies, and timing to use when designing the elements of your money flywheel and moves through the 3Bs framework.

Chapter 12: Top Tip #1 Design your Money Flywheel

No matter where you are on the 3Bs (Breaking In, Building Equity, Breaking Out), you need to start by designing your destination: your MegaWealth Money Flywheel.

Here's the typical money flywheel for easy reference:



When designing your final destination which is your fully activated money flywheel, it would seem obvious to start with what type of company you will build. Instead, we'll start with Advise, Invest, and finally Build. Your money flywheel will work better when the 3 areas positively feed off each other. This has a better chance of happening if you Advise, Invest in and Build companies that are in the same (or adjacent) industries and around the same size and maturity.

Advise

The advising portion of the MegaWealth Money Flywheel is the easiest to decide on *and* the hardest to execute. It's easiest to decide because it comes down to how formal of an advisor you want to be. It's the hardest to execute because you rely on others to reach out to you and ask you to be an advisor or board director, not the other way around. Let's figure out where you fall on the spectrum of size.

Self-Assessment: What kind of Advisor do you want to be?

Score yourself 1-5 on each of the following questions, 1 disagree, 5 agree, and add up your total score:

1. I enjoy a more formalized, organized process with meetings, slide decks, and successful people to strategize with.
Your Score: _____
2. I don't mind meetings, even all day, as long as they are with powerful, interesting people and they are efficiently run.
Your Score: _____
3. I prefer more strategic, competitive and branding discussions rather than fundraising and worrying about how much financial runway is left.
Your Score: _____
4. I dislike the uncertainty of working with very early (year 1-3) startups, even if that means I miss out on some exciting ideas.
Your Score: _____

Your Total Advise Score: _____

Advisor and/or on a Board of Advisors (4-9)

If you scored closer to 4, you might enjoy earlier stage startups, and if you scored closer to 9, you might like to work with startups that have a bit of structure, possibly having done their Series B round of funding.

Write a few sentences on what type of company you'd like to advise and your networking path to get noticed. Aside from company size and stage of funding, include industries you are drawn to, your areas of expertise and company examples if you have them:

Board Director (10-20)

If your score is closer to 20, although you may need to start being a board member at smaller companies, you may be happiest with larger, more established companies. If your score is closer to 10, then your sweet spot is likely a company who has done a few rounds of funding (Series B or C), but is still agile and hungry.

Write a few sentences on what type of company you'd like to be a board director of and your networking path to get noticed. Aside from company size and stage of funding, include industries you are drawn to, your areas of expertise and company examples if you have them:

Invest

It may take a bit of time to learn an investing system, and even more time to learn from market feedback what really works for you. Wherever you are in your learning journey, take a moment to reflect on where you might want to invest.

Investing Self-Assessment: Where do you want to engage?

For this self-assessment score 1-5 on each, 1 disagree, 5 agree, then add up the total score:

1. I did the work in this book (Chapters 7 and 11) on selecting attractive industries and companies. The industries I'm drawn to have strong growth, but are more developed, and less cutting edge than some others.

Your Score: _____

2. When I think about my personality and my answers to the Advise section, I realize that I prefer a balance of stability and growth. I think there are still plenty of opportunities for wealth generation with larger private companies.

Your Score: _____

3. It's no problem to start small, writing multiple checks as an angel investor, but in the end, I want to work on larger deals, with companies that have established customer bases and growth plans.

Your Score: _____

Your Total Invest Score: _____

Need for Speed (Score 3-6)

You may start as an angel investor and likely fall in love with the small startups space. You get the chance to envision and be part of a brand-new future on a daily basis.

Write a few sentences on what type of companies you'd like to invest in and your networking path to find these opportunities. Aside from company size and stage of funding, include industries you are drawn to, your areas of expertise and company examples if you have them.

Go Big or Go Home (Score 7-15)

You know yourself and prefer a bit more visibility, while still having the opportunity for massive upside. Later stage companies and VCs log plenty of doubles with the occasional home run. Here you have the option to align with either growth VCs or Private Equity (see Chapter 12 for how to choose). Investing in later stage companies takes more capital, so your likely path will initially be becoming a VC/PE scout, advisor or part-time partner.

Write a few sentences on what type of companies you'd like to invest in and your networking path align with a VC or PE firm as a part time partner or advisor. Aside from company size and stage of funding, include industries you are drawn to, your areas of expertise and company examples if you have them.

Build

In MegaWealth, you've seen that the build stage is moving any private company from point A to point B, and being able to show you helped that company grow. In fact, big (\$1 billion+) wealth gains, like we saw with Frank Sloatman, CEO of Snowflake, can happen at the later stage companies moving into IPO. You need to build a track record so you can both get the job offer and command a large equity stake for your efforts.

By filling out your self-assessments in Advise and Invest, you've started to circle what stage of company, industries and even company examples you might be most interested in working with. This will help you narrow down what you want to do in the Build portion of your money flywheel.

How to decide what and where to build

I purposely don't have a self-assessment in the Build phase. There are too many variables and thus the results wouldn't help your process. I know if you go through the next three items, you will come up with great ideas of where and what you want to help build.

Stage. What stage are you most comfortable at in the Advise and Invest sections? You can build at a company that is slightly in earlier stage, but not too far off, otherwise the flywheel won't generate huge returns by having interactions between your Build, Advise and Invest portions. Consider that you may want to start at a larger company first as they have more structure and training available, then move to smaller companies with more equity. Or you may want to start and stay small.

Write a few sentences on the stage of company you might want to work at and why.

Industry. From your work in Chapters 7 and 11, what industries do you have interest in, where you have background or can build knowledge and skills to develop a background in? Write down a few sentences on why you chose these industries, what skills you have, what skills you need to build, and how you will network in.

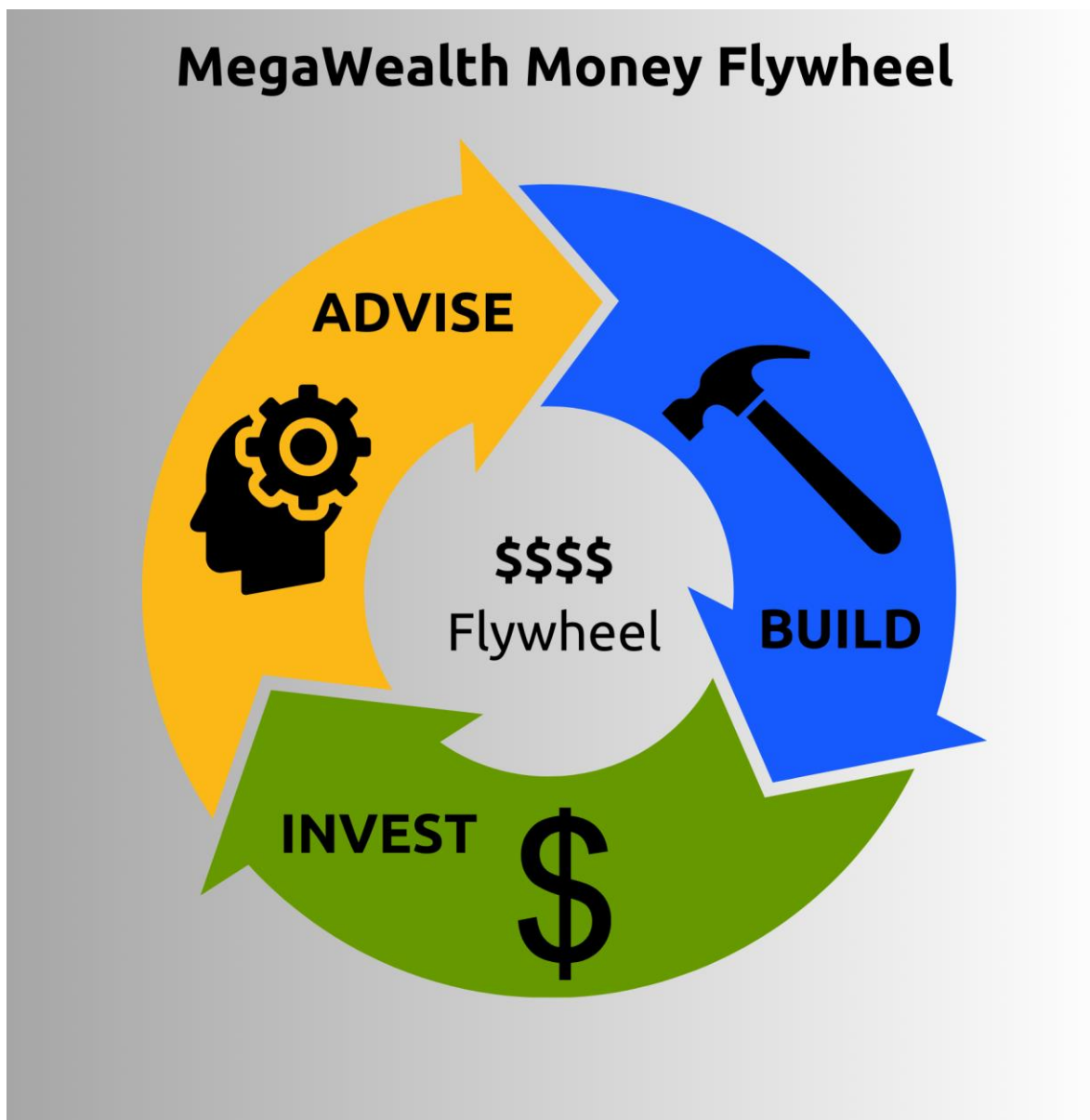
Company. Find great companies in the industries you are interested in. Make lists of their competitors, suppliers, customers. Get to know the industry dynamics and players. Check review sites to be sure you'd want to work there. Write down a list of target companies to network into for opportunities:

Choosing a company to build with will get easier as your money flywheel is activated. You'll develop a track record of building, investing, and advising, all of which will lead to new opportunities. But never let that stop you from redoing this process to refine your destination.

Always proactively go after what you want rather than reactively accept what is offered to you.

Chapter 12 Takeaways: Draw your money flywheel in your PDF.

1. Advise - write down advisor or board director.
2. Invest - write down VC or PE, and what stage is ideal for you.
3. Build - write down your target industry and 4 target companies.



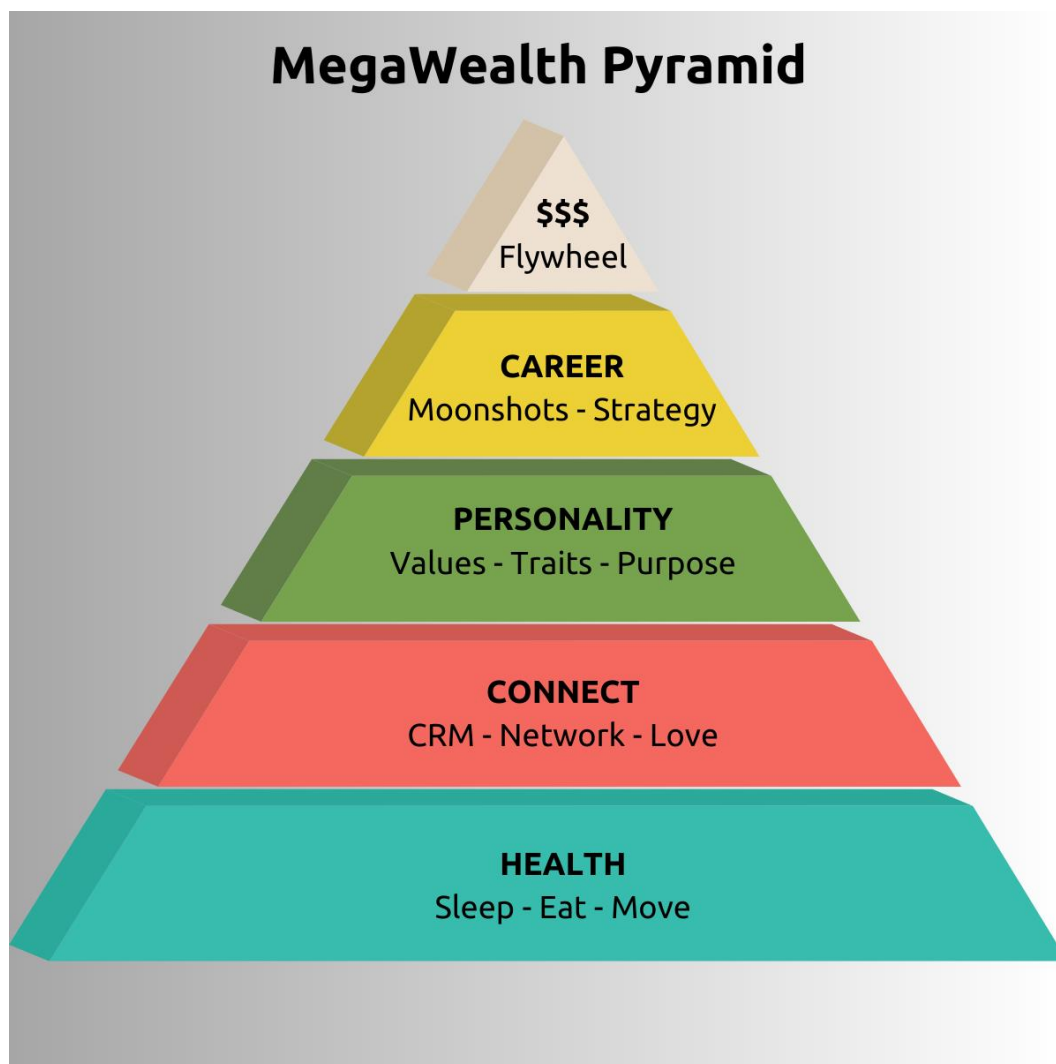
Huge congrats! You have a clearer picture of your destination. Now, in the next chapter of this MegaWealth Workbook, let's determine which potential roadblocks you want to remove.

Chapter 13: Top Tip #2: Removing roadblocks using your MegaWealth Pyramid

Auditing your MegaWealth Pyramid will help you identify and remove roadblocks to your MegaWealth plan. To help you do this, you'll:

1. Answer the Wealth Pyramid questions I ask below
2. Identify any potential foundational roadblocks to your plan
3. Go to the relevant chapters to find a way to improve them
4. Add those improvement goals to your quarterly and annual plans

Here's the MegaWealth Pyramid for removing roadblocks:



A pyramid is only as strong as its foundation. Starting from the bottom, you will perform a self-assessment of each layer.

Foundational Layer 1: Health

Embarking on a multi-year to multi-decade wealth plan which involves big goals and hard work requires stamina and good judgment. These come from a foundation of good sleep, nutrition, and exercise. You want to be healthy to enjoy the fruits of your labor!

To determine if there are any roadblocks in Health, ask yourself these questions.

1. How is your sleep (1-10)?
Your Sleep Quality Score: _____
2. How much do you want to improve your sleep (1-10)?
Your Sleep Importance Score: _____
3. How healthy is your network, i.e. do you have the right network for the big goals you have, and are the 5 people you spend the most time with all as smart or smarter than you (1-10)?
Your Network Quality Score: _____
4. How much do you want to improve your network (1-10)?
Your Network Importance Score: _____
5. How is your exercise routine - do you move regularly (1-10)?
Your Exercise Quality Score: _____
6. How much do you want to improve your exercise routine (1-10)?
Your Exercise Quality Score: _____

Analyzing Your Results: Order your 3 *health* areas by which ones you want to improve the most. Prioritize low scores which you have a high desire to improve. Write down actions you'll take, to add to your plan.

#1 Health Area of Improvement and Action Items _____

#2 Health Area of Improvement and Action Items _____

#3 Health Area of Improvement and Action Items _____

Foundational Layer 2: Connect

Networking is the only way to get where you want to go. You can't go it alone. Additionally, a major part of your mental and physical health is tied to feeling positive connections, both personal and professional.

To determine if there are any roadblocks in Connect, ask yourself these questions.

1. How organized is your networking process, i.e. do you have a personal CRM (1-10)?
Your Networking Process Quality Score: _____
2. How much do you want to improve your networking process (1-10)?
Your Networking Process Importance Score: _____
3. How deep, relevant and useful is your network (1-10)?
Your Network Quality Score: _____
4. How much do you want to improve your network (1-10)?
Your Network Importance Score: _____
5. How are your personal connections (friends, family and love life) - do you have the quality and quantity of relationships you want (1-10)?
Your Personal Connections Quality Score: _____
6. How much do you want to improve your personal connections (1-10)?
Your Personal Connections Importance Score: _____

Analyzing Your Results: Order your 3 *connect* areas by which ones you want to improve the most. Prioritize low scores which you have a high desire to improve. Write down actions you'll take, to add to your plan.

- #1 Connect Area of Improvement and Action Items _____

- #2 Connect Area of Improvement and Action Items _____

- #3 Connect Area of Improvement and Action Items _____

Foundational Layer 3: Personality

In order to have the most staying power and persistence in going after your goals, your personality (values, traits, purpose) must be in alignment with where you are headed. This is the most foundational step most of my clients want to skip, but the one that yields them, and will yield you, the greatest benefits.

First, perform a values audit.

Using the below list of core values, select words that speak to you. Write down other words that come to mind. Think of your favorite relative. Your best childhood pet. Your favorite friend (then or now). Why are they your favorite? What qualities do they possess?

Core Values List

Family	Involvement	Friendships
Freedom	Faith	Relationships
Security	Wisdom	Encouragement
Loyalty	Beauty	Pride in Your Work
Intelligence	Caring	Clarity
Connection	Personal	Fun-Loving
Creativity	Development	Charisma
Humanity	Honesty	Humor
Success	Adventure	Leadership
Respect	Kindness	Renewal
Invention	Teamwork	Home
Diversity	Career	Be True
Generosity	Communication	Contentment
Integrity	Learning	Friendship
Finesse	Excellence	Courage
Love	Innovation	Balance
Openness	Quality	Compassion
Religion	Commonality	Fitness
Order	Contributing	Professionalism
Advancement	Spiritualism	Relationship
Respect	Strength	Knowledge
Joy/Play	Entertain	Patience
Forgiveness	Wealth	Change
Work Smarter	Speed	Prosperity
Work Harder	Power	Wellness
Excitement	Affection	Finances
Change	Cooperation	Gratitude
Goodness	Love of Career	Grace

- | | | |
|---------------|-------------------|-----------------|
| Endurance | Willingness | Reciprocity |
| Facilitation | Trusting Yourself | Enjoyment |
| Effectiveness | Trusting Others | Entrepreneurial |
| Fun | Patience | Happiness |
| Fame | Forgiveness | Harmony |
| Justice | Self-Respect | Peace |
| Appreciation | Abundance | |

You should have 40 highlighted of qualities you like in others and qualities you want in yourself. For instance, some of my top values are independence, generosity, love, positivity, and integrity. Yours will be different.

Any words that show up more than once should make it to the top of your list. First, rank order your values. Next, take a hard look and see if there are any values you want to remove, or any you are living your life by that aren't serving you, or may not serve you in the next phase of your life. Those at the bottom of the list can be easily dropped, whereas those higher up will require more reflection before replacing or dropping them.

Take the final list of values and rank order them once more, really focusing on your top 5 and top 10. Print out your top 5-10 and put them where you see them every day. Doing this will make your daily decisions far more likely to be in alignment with your values. Then your decisions are easier to make, less likely to cause regret and more likely to move you in your desired direction.

Your final list of top 10 Values:

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

To determine if there are any roadblocks in Personality, ask yourself these questions.

1. How much do you live and act in accordance with your highest-ranked values (1-10)?

Your Values Alignment Quality Score: _____

2. How much do you want to improve your value-to-action alignment (1-10)?

Your Values Alignment Importance Score: _____

3. How much do you possess the following traits: resilient, flexible, scalable, action-oriented, proactive not reactive (1-10)?
Your Leadership Traits Quality Score: _____
4. How much do you want to improve these traits (1-10)?
Your Leadership Traits Importance Score: _____
5. How well aligned are your values and traits, such that you have a clear sense of purpose (1-10)?
Your Sense of Purpose Quality Score: _____
6. How much do you want to improve your life purpose alignment with your values and traits (1-10)?
Your Sense of Purpose Importance Score: _____

Analyzing Your Results: Order your 3 *personality* areas by which ones you want to improve the most. Prioritize low scores which you have a high desire to improve. Write down actions you'll take, to add to your plan.

#1 Personality Area of Improvement and Action Items _____

#2 Personality Area of Improvement and Action Items _____

#3 Personality Area of Improvement and Action Items _____

Clarity on your values, traits and purpose will also help you choose focus areas when building your own money flywheel.

Layer 4: Career

Finally, we are at the career layer. The biggest challenge I see that stops people from building as much wealth as they could in their career is- they don't dream big enough. You need to *moonshot your career* because you don't have any idea how much more you are capable of than you think.

To determine if there are any roadblocks in Career, ask yourself these questions.

1. How big are your goals, and are they true moonshots (1-10)?
Your Career Goals Moonshot Quality Score: _____
2. How much do I want to improve the moonshot nature of your goals (1-10)?

Your Career Goals Moonshot Importance Score: _____

- 3. How is your career strategy, i.e. is it clear, concise, and understandable (1-10)?

Your Career Strategy Quality Score: _____

- 4. How much do you want to improve your career strategy (1-10)?

Your Career Strategy Importance Score: _____

Results: Order your 2 career areas by which ones you want to improve the most, as long as they still have room for improvement. My experience is that very few people have big enough moonshot goals, but you may be an exception. You will lay out your strategy using this MegaWealth workbook, step by step, once you have defined your moonshot goals.

#1 Career Area of Improvement and Action Items _____

#2 Career Area of Improvement and Action Items _____

Layer 5: \$\$\$ Flywheel

You built your money flywheel in Chapter 12. Now we are going to find and remove any obstacles might hold you back from executing your MegaWealth Money Flywheel.

To determine if there are any roadblocks in Flywheel, write down your answers to these questions.

- 1. How well aligned are your time spent in the 3 areas of your flywheel (build, invest, advise) and your top strengths and skills (1-10)?

Your Flywheel-Skills Alignment Quality Score: _____

- 2. How much do you want to improve your alignment (1-10)?

Your Flywheel-Skills Alignment Importance Score: _____

- 3. List the lower layers in your MegaWealth Pyramid you will improve to support your money flywheel.

Your Pyramid Improvement Priorities:

4. How much will not improving these areas hold you back in building a strong money flywheel (1-10)?

Your Pyramid Improvement Importance Score: _____

Results: Revisit the lower layers of the MegaWealth Pyramid, not to procrastinate, but to be sure nothing critical is holding you back. This isn't about perfection, it's more like Occam's razor: making the most direct path to your goals while removing large obstacles in the way.

#1 Flywheel Area of Improvement and Action Items _____

#2 Flywheel Area of Improvement and Action Items _____

Chapter 14: Top Tip #3: Map Your MegaWealth Plan

You have envisioned your destination (the MegaWealth Money Flywheel), and identified roadblocks for removal using your MegaWealth Pyramid. Now it's finally time to build your MegaWealth Plan.

Building out your plan will have 3 steps:

1. Naming your end destination - the 3 parts of your Money Flywheel
2. Naming the roadblocks in your Wealth Pyramid you want to eliminate
3. Mapping out where you are on the 3 Bs and putting everything in a sequential plan.

Step 1: Naming your end destination

Write down your best estimate, after some research, as to the industry, the companies, and the stage of growth and maturity of those companies you want to interact with. Do this for Advise, Invest and Build. Now write it down as statements:

Example: I will Advise as an Advisor/Board Director the following types of companies in the following industries. Fill in your answer here.

Example: I will Invest as an Angel in the following types of companies and industries, while also working to gain a part-time role at a VC or PE firm which invests in the following stage, types of companies, types of industries. Fill in your answer here.

Example: I will Build and make measurable contributions to the growth of private companies in the following stage and industry. Fill in your answer here.

Step 2: Removing your roadblocks

Write down the list from Chapter 13 of all the roadblocks you identified in your MegaWealth Pyramid. As a reminder, these are items you scored yourself low on where you also scored high on wanting to change them.

Make an inventory of your areas of improvement, layer by layer:

1. Health: Sleep, Eat, Move. List specific actions you will take to improve the areas you want to improve.

2. Connect: CRM, Network, Love. List specific actions you will take to improve the areas you want to improve.

3. Personality: Values, Traits, Purpose. List specific actions you will take to improve the areas you want to improve. Pay particular attention to the alignment between your top 5 values and your top 5 desired traits to achieve your goals.

4. Career: Moonshots and Strategy. List specific actions you will take to improve the areas you want to improve.

Step 3: Building your plan

First, name your destination, ie what will you be working on and how will your life look specifically, in 20 years, 10 years and 5 years from now. Write out a paragraph for each, which can include what you are doing in terms of your money flywheel activities as well as family and other goals.

Everyone is different depending on how far out you want to plan, perhaps 30 years instead of 20, for example. Yours could look like this:

20 Years:

Example: I will be on 3+ boards of directors, be an angel investor with 40+ lifetime investments, be a part-time partner at a top VC firm, and have built and exited 4 companies. I have a happy family life, with friends outside of work. I am healthy and active.

Your answer:

10 Years:

Example: I will be on 1-2 boards of directors, advise several other startups, be an angel investor with 10+ lifetime investments, and have exited 1-2 companies where I was in a key leadership role.

Your answer:

5 Years

Example: I will be on 1-2 boards of advisors and/or boards of directors, advise several other startups, be an angel investor with 5+ lifetime investments, and have exited 1 company where I was in a key leadership role.

Your answer:

Great job so far. You're almost done!

Next: Make a quarterly plan for the next 4 quarters (1 year), where you will populate your interim goals including removing your roadblocks. It could look like this:

1Q25:

Example: Lay the foundation. Do the research. Get/Read books/tools/courses. Study paths you want to emulate of leaders in your industry. Make a plan of action for your priority areas like sleep, diet, networking, exercise, or whatever else cropped up in your Pyramid.

Research target industries, companies and who their VC/PE investors are. Research what CRM you want to use. Remove sugar from your diet. Add 30 minutes of walking per day to each day. Plan out your networking plan and start to fill out your CRM so you can systematize it.

Your answer:

2Q25:

Example: Start researching the skills you will need in the companies and industries you have decided on. Make a plan to add these needed skills through course work or experience. Use your CRM to network in a systematized way. Make plans for how many relevant people you will meet each month and track your results. Now that you have your targeted industry and company and have done research, start sharing your views in a consistent way (3-5X per week) on LinkedIn.

Set your priorities for implementation after research. The action items could look like this:

1. 80% work IN your life, 20% work ON your life (planning, strategy, learning).
2. Start implementing your foundation CRM
3. Start time blocking and doing deep work.
4. Spend 1 hour per week for long-term planning, reflection and journaling. 1-2 hours per week for professional social media creation.
5. Create a monthly and quarterly review cycle to track your top areas of improvement from your pyramid (they could be sleep, diet, exercise, personal, networking) and track progress against your goals.
6. Perhaps create a linktr.ee of your top links or your own website (I like Squarespace) which people also can use to get to know you better.
7. Position yourself for and accept public speaking gigs that help your Build, Invest, Advise progress.
8. Network with VCs and PE firms as well as their portfolio companies. You could also consult with a portco, showing progress to investors.

Your answer:

3Q25:

Example: Consider how you might add value to your connections you are building in these industries or companies. What expertise or connections can you share? Keep building out your skills, network, and moving towards your goals. Your list for the third quarter could look like this:

1. Calendar regular check-ins with new network, using CRM
2. Outline and write your first book, establishing your thought leadership in a way that social media posting cannot. Think about what you want to speak about for the next 5-10 years that's at the intersection of where you are going professionally. Write about that.
3. Use 1 hour per week for long-term planning, reflection and journaling.
4. Use 1.5 hour per week for social media and newsletter creation. Start promoting your book once it is in final draft form.
5. Consider starting a newsletter on your industry of interest. This should take 30-45 minutes per week. Add this time on to the hour you are writing social media posts.
6. Build a feedback loop of areas you want to improve and ways to measure them (they could be sleep, diet, exercise, personal, networking) and use your monthly and quarterly review cycle to track these areas against your own goals

Your answer:

4Q25

Example:

1. Reflect on your progress. You have been using this system for almost a year, you are better known, you are timing the building of your money flywheel to best fit where you are in the 3Bs framework.
2. Celebrate milestones. Your book may be out and you've been building your network and consistent on social media for over 6 months.
3. Continue with 1.5 hours social + newsletter, 1 hour LT planning, public speaking training plus speaking engagements, regular network reach outs, and review cycles.
4. Keep networking with VCs and PE firms about board seats, CXO opportunities, especially helping via paid consulting at relevant portcos while still continuing to build equity at your day job.
5. Depending on where you started, you may have the goal to be an advisor, board observer or have a board role pending by YE25.

Your answer:

NOW you have one year of quarterly plans. Keep adding another quarter of plans as you move through the last quarter.

Then move to annual plans for the following two years:

2026

Example:

1. Perhaps you've been at the private company building equity and delivering significant traction for 2 years. You have moved up to a C-Suite role, or have delivered significant traction at your company such that you have offers for C-Suite role elsewhere. Balance trying to stay at each role approximately 3 years to rack up accomplishments with moving to the next bigger opportunity.
2. You have built and formalized a tight relationship with 1-3 VC or PE firms and are seen as someone who can get into a business to energize growth. You have carry with at least one VC or PE firm. You are on at least one board, perhaps observing on another.
3. Your money flywheel is activated!
4. Continue with 1.5 hours social + newsletter (or hire a VA to run some of this), 1 hour LT planning, public speaking training plus speaking engagements, regular network reachouts, and review cycles.

Your answer:

2027

Example:

1. You are ready to exit your first private company role with significant equity gains.
2. Your next opportunity might be pre-IPO if you preferred to be in larger companies, or it may be starting at a company at an earlier stage where you can be awarded 5-10% of the equity for a C-Suite role. Design where you want to be and what kind of leadership you will provide.
3. You choose your next opportunity with the visibility of having worked closely with your favorite VC or PE firms, being on boards, and having access to opportunities that only come with being in these networks.
4. This experience of leading either pre-IPO and post-IPO public company or a smaller high growth company on a unicorn path sets you up for more lucrative board and leadership roles.

5. Continue with 1.5 hours social + newsletter (or hire a VA to run), 1 hour LT planning, public speaking training plus speaking engagements, regular network reachouts, and review cycles.
6. You launch your second book, to stay top of mind, update your thinking based on what you've learned, and to support your next career goals.

Your answer:

Then have a plan for 5 years out that could look like this:

2029

Example:

1. You are at the center of your chosen industry's discussions as a trusted leader, investor, advisor. You are a true thought leader.
2. You have your second big exit, this time as part of the C-Suite, perhaps via IPO if you chose the growth company route, or by acquisition with you having a bigger percent of the pie if you chose the smaller company route. You have the option to create your own family office to formalize your investing and leave a legacy.
3. You have the acumen to choose when have zero debt or to add financial leverage, and with what proportion of your assets, to take advantage of opportunities and grow your wealth to the next level.
4. You have a large social following, plus email subscribers and loyal book readers. You can launch a 3rd book either in 2029 or 2030 as a precursor to your next steps in your career.
5. You have the choice of going ultra-small and co-founding a startup with high caliber co-founders and VCs who know you, or staying at a different stage of company, perhaps taking a company through the IPO process and leading a small public company.

Your answer:

Finally, have a plan for 10 years out that could look like this:

2034

Example:

1. You are wealthy, connected, powerful and considered a person who gets things done.
2. You are known (through your networking, books, newsletter and social) by people of influence in your sphere, and enjoy those you interact with.
3. You marvel at the fact that you are paid far more, to work less hard, on things you greatly enjoy, and with brilliant people! This is what having arrived is all about!

Your answer:

MegaWealth Workbook Takeaways:

1. You have created your destination (your money flywheel) and made plans to remove your roadblocks, and entered everything into your own plan, laid out quarterly, annually, and then 5 and 10 years out.
2. Once you have your plan, start executing and don't forget to take time to reflect on your wins and progress against your plan.
3. Remember this plan is a living document, so as you exceed in some areas and take longer in other areas, update your plan.
4. As you start to work in private companies, you'll get a better idea of the size and type of company and industry you want to be in. Feel free to change your end goals, but try not to change your destination too often.

Congrats!

You have built a plan few people have even thought about. Now you can work towards your huge goals proactively with purpose, to build the most amazing life possible.