



VIRTUAL

INGENUITY, LLC

How to Make Decisions that Are in Alignment with Your Financial Purpose

Show Notes

In this episode of The Virtual Ingenuity Business Podcast, Claudine Land, Business Strategist of Virtual Ingenuity, LLC, and Dale L. Shafer II, Founder, and Financial Advisor of Life Moves Wealth Management discuss strategies to align your finances for making informed financial decisions.

Dale L Shafer II, is a CERTIFIED FINANCIAL PLANNER™ (CFP®), Accredited Portfolio Management Advisor™ (APMA®), and Certified Divorce Financial Analyst (CDFA®). Out of the office, he is most likely found exploring outdoors and hiking with his wife or on his bike. He also rocks out behind a drum kit or a guitar and enjoys reading books on finance and leadership and collecting deadpan “dad jokes” to try out on our kids.

Having a clear understanding of your goals, values, and statement of financial purpose, and keeping them in alignment is key to achieving financial success. Listen as we discuss actionable steps used for getting alignment with your financial purpose:

- Write out your top three goals for the next 12-24 months.
- Set the goals aside. Now identify 10 values that are most important to you, then narrow those down to five and rank them in order of importance.
- Your values are the beacon for your financial decisions and can be put together to create your Statement of Financial Purpose.
- With your values in mind, write your Statement of Financial Purpose (what’s most important and why) – be concise and precise.
- Test it: make sure that your top 3 goals are aligned with your values and statement of financial purpose.

We close by asking Dale if our listeners could have one take-a-away from what we talked about today, what is that one takeaway, and what is the one piece of advice he wished someone had given him when starting his business.

Learn more about **Life Moves Wealth Management**:

- Website - <https://lifemoveswealth.com/>
- Business – (Facebook, Twitter, Instagram, LinkedIn, YouTube) - @LifeMovesWealth
- Personal – Dale Shafer
- Podcast – *The Financial Purpose Podcast* on Substack, Google, iHeart, Spotify, Apple, Amazon Music and Audible

Tune in to additional episodes of The Virtual Ingenuity Business podcast on [Apple Podcast](#) and [Spotify](#). We would love it if you like, subscribe, rate, and comment.

- Apple Podcast: <https://podcasts.apple.com/us/podcast/the-virtual-ingenuity-business-podcast/id1644909518>
- Spotify: <https://open.spotify.com/show/43s0aubuQOxnjXoqqAnjlp>

You may visit Virtual Ingenuity, LLC at: <https://virtualingenuityllc.com>

Thank you for listening!

Let's impact together! [Virtual Ingenuity, LLC](#)