



User Guide IGNITE: Securing Financial Sustainability: Template

Introduction:

Master your PROSPER templates to secure wealth, using UYP's actionable principles.

Template Guidance:

- Financial Planning Worksheet: Set 3 financial goals in Xero; review with Phil.
- Revenue Growth Tracker: Test 2 revenue streams monthly via Mailchimp; track in Stripe
- Profit Organisation Checklist: Adjust 1 product's pricing in QuickBooks; automate with Zapier.
- Resilience Roadmap: Build a 5% profit reserve in Xero; stress test in Google Sheets

General Tips:

- Use templates weekly to align with UYP's "Setting Your Goals the Right Way."
- Track in Google Sheets, Notion, or paper for consistency.
- Experiment with one new tool (e.g., Trello) monthly.
- Book a call with Phil at <https://phillipmatthew.com/book-a-call/> for feedback.
- Reflect biweekly to sustain financial momentum.