

Accounting Day 2019: Maintaining Your Health and Personal Finances as a Busy Professional

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Who am I?

- San Diego Native
- CPA
- Health Coach
- I've experienced my own health transformation – physically and mentally



Agenda

- Why are we here?
- Tackling our Health Goals
- Tackling our Wealth Goals
- Questions

What's important about health/wellness?

- Everyone in this room loves numbers... however when it comes to health, we can't just focus on the scale
- It's the path to you being the best YOU (professional, parent, spouse, friend)



What's important about focusing on personal finances?

- Helps reduce stress
- Sets you up for the lifestyle you want to have.



How are health and wealth related?

- If your health isn't optimal...

- Medical bills
- Miss work
- Not performing well at work
- Money spent on dining out
- Money spent on ANYTHING (emotional spending)

- If you're worried about money...

- Stress
- Overeat
- Lack of sleep
- Lack of motivation to exercise
- Depression
- Poor relationships

Health Goals

- Think about one health goal for yourself
- We know WHAT to do...why don't we do it?
- Change your thoughts, change your life
- Visualization exercise

I'm gonna lose weight. I'm gonna exercise everyday. I'm gonna go on a diet and stick to it....
Is that cake?



ROTTENCARDS

Health Goals

- Changing your Mindset
 - Your Why
 - Roadmap
 - Focus on the long-term
 - Do the easy stuff
 - Get support



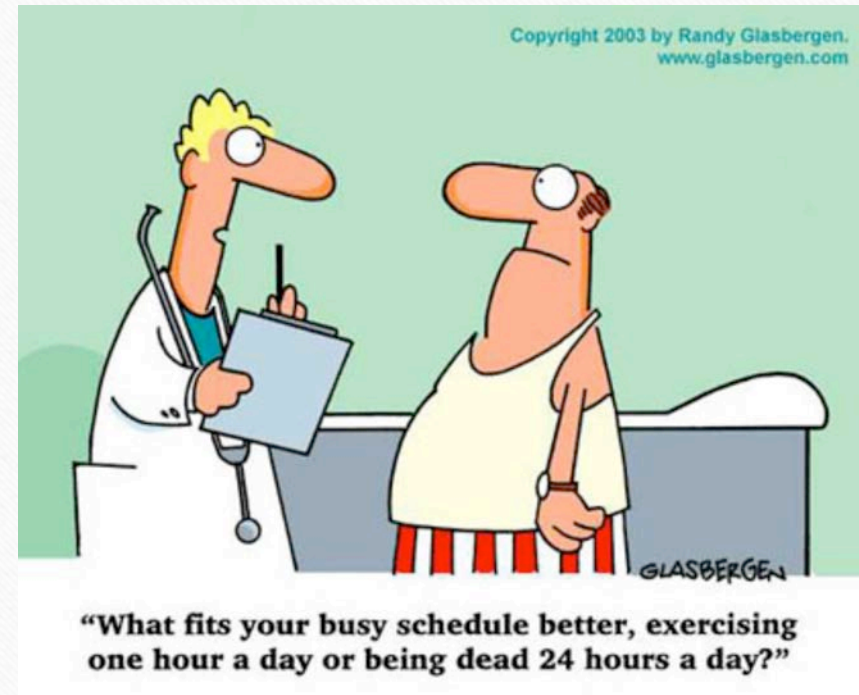
Belief Systems



- Underlying/unknown principles we live by
- Generally formed in your childhood
- Identify what's not serving you and make a change
 - Aligned with your goal?
 - Is it true/relevant?

Common Beliefs about Health

- Eating healthy is a punishment
- Losing weight is hard
- It's too expensive
- Trying to be healthy is boring
- No matter what I do, nothing works for me
- I have no time
- I can't because of _____



Shifting Beliefs

- Tedx episode – Tali Sharot, behavioral neuroscientist
- Social incentives
- Immediate reward
- Progress

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What to Eat



No cookie cutter answer for everyone



Eat real food



Pick something that works for your lifestyle and stick to it

3 square meals or 5-6 smaller meals
Meal delivery, home cooking, or a combination
Paleo, Mediterranean, Vegetarian, 40/30/30
balance

Let's Talk Money

We know WHAT to do, so why don't we do it?

Thoughts, emotions, mindset...

You're in control

Personal Finance Goals

- Where to start:
 - Identify your beliefs
 - Money has energy
 - Awareness of income and expenses
 - Have a plan (budget, save, track, tweak, repeat...)
 - Pay attention to the small stuff
 - Pay attention to your emotions

Summary

- You have control
- Small stuff matters
- Solidify your Why, Vision, and a Plan
- Get support – don't do it alone



You can do it!

This is NOT about depriving yourself.

Enjoy life now AND plan for an amazing future.

Consistency is KEY.

Short-term sacrifice for long-term GAIN.

Thank you!

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- Questions

My Info:

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