

ELOGE CAPITAL GROUP

FINANCIAL RESET GUIDE

A practical framework to organize what you have, protect what matters, and create a clearer path forward.


ELOGE
CAPITAL GROUP

A brighter financial tomorrow starts with a plan.

PROTECT. EMPOWER. GROW.

Welcome to Your Next Chapter

Your finances are more than numbers — they are the foundation for the life, freedom, and opportunities you want for you and your family. This guide was created to give you a clear, practical starting point to reset, organize, and build with confidence.

Whether you're managing personal finances, working as an independent professional, or growing a business, the same principles apply: clarity, structure, and intentional action.

**A STRONGER TOMORROW BEGINS
WITH BETTER FINANCIAL HABITS
TODAY.**



01

Get a Clear Financial Snapshot

Clarity is the starting point. Before you can make a plan, you need an honest view of where you are today.

CURRENT SNAPSHOT

- ☐ Monthly take-home income
- ☐ Essential monthly expenses
- ☐ Debt and minimum payments
- ☐ Savings and cash reserves
- ☐ Insurance / protection costs
- ☐ Amount left after obligations



MINDSET SHIFT

You can't build what you don't see. Take time to gather your statements and get an honest look at your numbers. This is not about perfection — it's about progress.



02

Organize Your Cash Flow

A simple structure helps you manage your money with intention and reduces financial stress.

1

OPERATE

Cover essential living and business expenses.

2

PROTECT

Set aside funds for insurance, emergencies, and unexpected costs.

3

BUILD

Invest in debt reduction, savings, and long-term growth.

4

FLEX

Allow for lifestyle, opportunities, and planned enjoyment.

03

Protect What Matters

Financial protection helps safeguard your income, family, and future. The right coverage and planning can reduce risk and provide peace of mind.

- **LIFE INSURANCE**
Provide for your loved ones.
- **HEALTH COVERAGE**
Protect your health and income.
- **EMERGENCY FUND**
Be prepared for unexpected costs.
- **REVIEW BENEFITS**
Understand and maximize available benefits.



*Protection today creates
opportunities tomorrow.*

PROTECT. EMPOWER. GROW.

04

1099 & Self-Employed Financial Structure

If you're an independent professional or business owner, a strong financial structure is essential for stability, compliance, and growth.

INCOME ORGANIZATION

Track all income sources and keep personal and business finances separate.

CASH FLOW STRUCTURING

Create a system that supports consistent income and growth.

TAX-READY SYSTEMS

Set aside funds for taxes and maintain organized records.

CUSTOMIZED STRATEGIES

Your structure should fit your goals, industry, and income level.





Build today for a bigger tomorrow.

05

Business Financial Foundation & Capital Readiness

A strong financial foundation positions your business for growth and funding opportunities.

- **BUSINESS FINANCIAL STRATEGY**

Develop a clear plan and financial structure.

- **FUNDING READINESS**

Position your business for lending and investment opportunities.

- **FINANCIAL ORGANIZATION**

Keep accurate records and reporting.

- **EQUIPMENT & WORKING CAPITAL**

Plan for the tools and resources you need.



06

Your 30-Day Financial Reset Plan

Small, consistent steps create real results. Use this 30-day plan to build momentum and take control of your finances.

W1 CLARITY

- Gather your financial information
- Review income, expenses, and debt
- Set your top 3 financial goals

W3 PROTECT

- Review insurance coverage
- Confirm beneficiaries
- Identify and close protection gaps

W2 ORGANIZE

- Create a cash flow structure
- Separate personal and business finances
- Set aside funds for taxes and emergencies

W4 BUILD & PLAN

- Explore savings and investment options
- Review funding opportunities
- Create a plan for the next 6-12 months

ELOGE CAPITAL GROUP

Your Next Move Starts Here

You don't have to figure it out alone. Eloge Capital Group can help you create a personalized strategy that protects what matters and positions you for long-term financial success.

SCHEDULE A CONSULTATION

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Educational material only. Product availability and eligibility may vary.