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# The Lifestyle and Wealth Alignment Review

This document forms the first diagnostic within the Poised Wealth strategic framework.

Founding Edition • Private Strategic  
System

# How to Complete the Founding Edition

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Estimated time: 90–120 minutes.

Complete this review in one uninterrupted sitting where possible.

Work in order. Do not skip ahead.

Do not optimise or correct as you go.

Do not reduce numbers. Do not round estimates. Calculate precisely.

Record responses directly into this document.

This is a visibility exercise.

Do not attempt correction during completion.

# Founding Edition — Objective

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Establish absolute clarity.

This review is not reflective journaling.  
It is structured visibility.

By the end of this review, you must be able to state:

“I see exactly where I stand.”

Nothing motivational.  
Nothing therapeutic.  
Only clean architecture.

# Opening Positioning Statement

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## An Audit of Reality

This review is an audit of reality.

Not your potential.

Not your aspirations.

Not your fears.

Your current structure.

Most women at this stage are not failing.

They are maintaining.

Maintenance is efficient.

It is also dangerous when unexamined.

Stability can quietly replace design.

This review replaces assumption with precision.

# Strategic Audio Brief

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Duration: 5-7 minutes

Listen before beginning this review.

Do not proceed until you have listened in full.

Core framing:

- Stability can mask misalignment.
- Responsibility can become inertia.
- Maintenance is not design.
- Clarity precedes recalibration.
- This is a visibility exercise, not a correction exercise

*"We are not changing anything yet.  
We are establishing the architecture of truth."*

SECTION I

# Income Architecture Visibility

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# Income Architecture Visibility

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Objective: Expose the true structure of how money currently enters your life.

Not just amounts. Structure.

You are mapping architecture, not storytelling.

No emotional interpretation.

No optimisation.

Only visibility.

# Income Source Mapping – Step 1

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List every income stream. Do not omit minor sources.

Record annual amounts, not monthly.

For each stream, complete the full classification.

Income Source 1: \_\_\_\_\_

Annual Amount: \_\_\_\_\_

Active / Semi-active / Passive: \_\_\_\_\_

Stable / Variable / Declining / Growing: \_\_\_\_\_

Energising / Neutral / Draining: \_\_\_\_\_

# Income Source Mapping – Continued

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Income Source 2: \_\_\_\_\_

Annual Amount: \_\_\_\_\_

Active / Semi-active / Passive: \_\_\_\_\_

Stable / Variable / Declining / Growing: \_\_\_\_\_

Energising / Neutral / Draining: \_\_\_\_\_

Income Source 3: \_\_\_\_\_

Annual Amount: \_\_\_\_\_

Active / Semi-active / Passive: \_\_\_\_\_

Stable / Variable / Declining / Growing: \_\_\_\_\_

Energising / Neutral / Draining: \_\_\_\_\_

# Income Source Mapping – Continued

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Income Source 4: \_\_\_\_\_

Annual Amount: \_\_\_\_\_

Active / Semi-active / Passive: \_\_\_\_\_

Stable / Variable / Declining / Growing: \_\_\_\_\_

Energising / Neutral / Draining: \_\_\_\_\_

Income Source 5: \_\_\_\_\_

Annual Amount: \_\_\_\_\_

Active / Semi-active / Passive: \_\_\_\_\_

Stable / Variable / Declining / Growing: \_\_\_\_\_

Energising / Neutral / Draining: \_\_\_\_\_

# Total Income Calculation – Step 2

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Calculate precisely. Do not estimate.

**Step 1: Add all annual income figures.**

Total Annual Income: \_\_\_\_\_

**Step 2: Identify the single largest income source.**

Largest Income Source: \_\_\_\_\_

Annual Amount of Largest Source: \_\_\_\_\_

**Step 3: Calculate concentration percentage.**

Largest Source ÷ Total Income × 100

Income Concentration Percentage: \_\_\_\_\_





SECTION II

# Lifestyle Commitment Mapping

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## Lifestyle Reality vs Lifestyle Preference – Step 2

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Column A: Current lived lifestyle

Column B: Desired lived lifestyle if deliberately designed today

Assess across:

Time ownership

Work intensity

Travel frequency

Location flexibility

Health priorities

Responsibility load

Social obligations

Personal space

Identify clear structural gaps.



SECTION III

Time & Energy Allocation Review

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# Energy Reality Check – Step 2

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Label major commitments as:

Expands me

Neutral

Depletes me

Identify the top three drains.

Do not attempt correction.

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SECTION IV

# Misalignment Identification

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# Misalignment Identification

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Answer concisely and declaratively:

Where am I over-maintaining?

Where am I under-designing?

Which financial structures reflect a life I no longer live?

Where is earning capacity under-leveraged?

What am I tolerating that I would not design today?



FINAL OUTPUT

# Current Position Statement

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# Current Position Statement

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Maximum two pages.

This is a structural synthesis.

You are defining your current position clearly and without distortion.

Include:

Income structure summary

Commitment burden summary

Time and energy distribution reality

Primary misalignment identified

One sentence describing current decade trajectory if nothing changes

*"If I do nothing, this is the decade I will create by default."*





# Review Completion Declaration

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I have documented my current financial and lifestyle structure without distortion.

I have identified primary areas of misalignment.

I understand the trajectory I am on if no change occurs.

*Signature:* \_\_\_\_\_

*Date:* \_\_\_\_\_