



ISO WEALTH

# Disclaimer

*I am not an attorney, nothing I say is to be considered legal advice.*

*I am not an accountant, before adopting strategies from this presentation it is best to consult a CPA to confirm they are right for you.*

*I am not a financial advisor, nothing I say, or present is to be considered as investment advice. Please consult your financial advisor before making any investment.*

*This presentation was designed around my personal experiences. Each person's situation is different. Please consider this when making decisions that will affect your unique personal financial situation.*

# *What Are We Going to Talk About Today?*

- What is **wealth** and why we should talk about it...
- What is the core reason people **fail to build wealth**...
- Why are **marketers specifically** so terrible at building wealth...
  - Watch out for “Marketer Mistakes”
- If you need help text me 202-738-6344 at any time



# *Why Talk About Wealth?*

- Money is a tool
- Prosperity opens a whole new world of opportunities
- With the right understanding, anyone can achieve it
- Really, why the heck not?

# *First off.. What is Wealth?*

- It's different for everyone (so they say)
- Some people tie wealth and happiness together..
- Some people who are flat broke say they feel 'rich' with love
- I'm happy for those people, but that isn't me
- For the sake of this presentation we're talking **Asset Wealth**
- If you're looking for rainbow and butterfly wealth.. sorry



# Download These Worksheets

- ISO Wealth: Wealth Worksheet
  - Download at: [www.rcbryan.com/wealth-worksheet](http://www.rcbryan.com/wealth-worksheet) (no email needed)
- ISO Wealth: Wealth Persona Worksheet
  - Download at: [www.rcbryan.com/wealth-persona-worksheet](http://www.rcbryan.com/wealth-persona-worksheet) (no email needed)
- NOTE: *This presentation is designed to be printed. It contains all the needed instructions to complete the above documents. It's a little wordy but that is by design.*

*Hi, my name is Roger Bryan*



# My Personal Wealth – Where Does it Come From?

WASTEWATER PRO

Fresh  
Lemon  
Blue

RB Roger Bryan  
LEARN EARN INVEST

BLOCK Capital

AERATION SEPTIC INC.  
AST  
WASTEWATER SERVICES

ENFUSEN

USA PRECAST CONCRETE

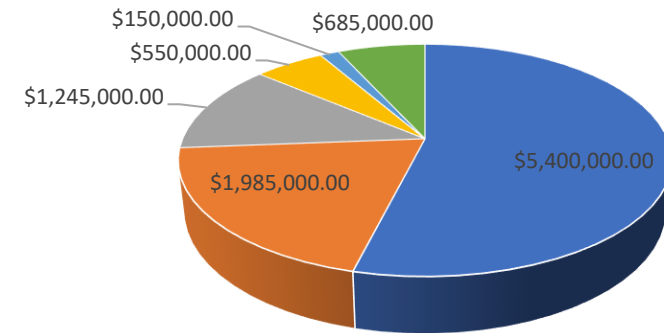


K&R COMPANY, LTD.

MedTuff



\$10M+ Net Asset Portfolio



- Privately Held Companies
- Real Estate
- Investments
- Collectibles (Books & Art)
- Cash
- Private Placements (Pre-IPO)

\* As of September 2020

RB Roger Bryan  
LEARN EARN INVEST

Need help on your wealth journey.. text me 202-738-6344...

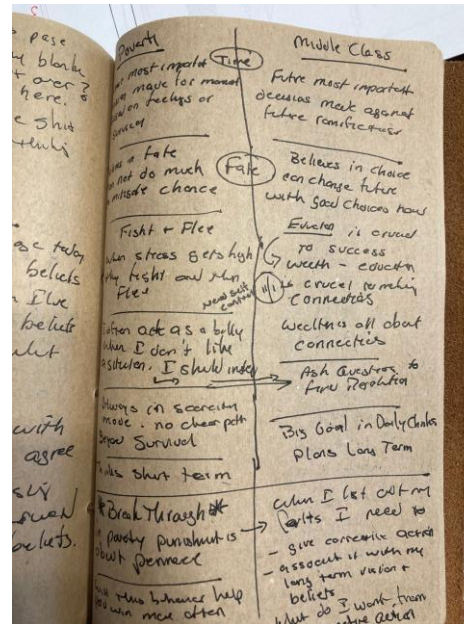
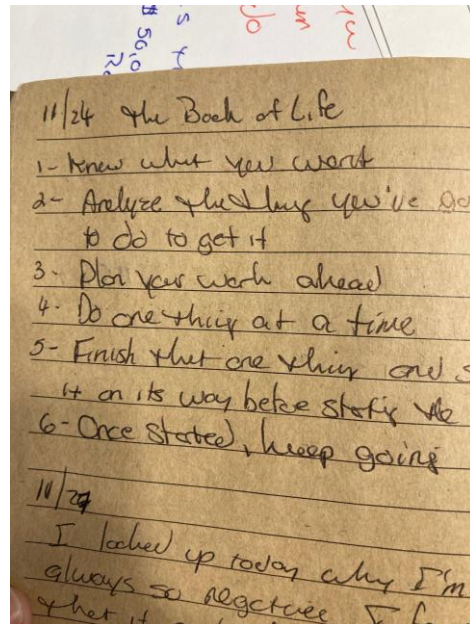
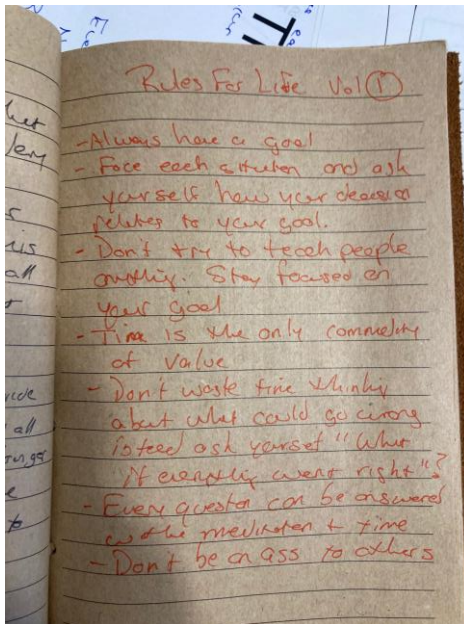


# *Every Action Has a Purpose*

- So what is my purpose here?
  - I set out to create a game plan for my daughter that helps her to make less mistakes than I did
  - Continue to improve the system
  - Share the system with others so they succeed on their wealth journey
- What is your purpose for being here today?



# My Purpose...



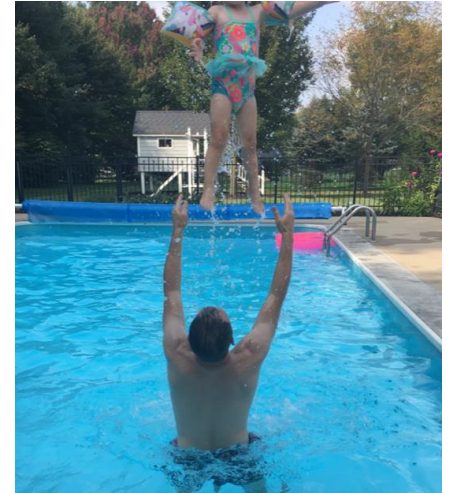
# *My Journey...*



1994 – Cleveland, OH  
\$0 NET Worth



Friday, April 18<sup>th</sup>, 2008 – RFD Washington, DC  
\$1,000,000 NET Worth



Sunday, Sep 27<sup>th</sup>, 2020 – Massillon, OH  
\$10,000,000 NET Worth

# *“So.. How Big is Yours?”*

- What’s your number today?
- Write it down..
- Don’t think about it.. just write
- Do you know what it is?
- Is it as big as you’d like it to be?
- If it’s not, what would you like that number to be?



# *Myth Busters: Wealth Building Edition*

- Big Risk = Big Reward
- High Paying Jobs = Wealth
- Wealth comes without work
- Wealth is purely for the lucky
- You need to be born into it
- Your situation or circumstances are what is stopping you





# *Flaw Fallacy*

- Every individual has a prominent flaw that stops them from achieving desired outcomes.
- Every relationship (partner) has a flaw, successful relationships are the ones that can overcome that flaw and not be drawn down by it.
- Your wealth building journey will be no different. The sooner you identify and deal with your flaw the faster you'll build wealth.

# *Why Do People Fail to Build Wealth?*

- They have a fatal flaw
- Almost like an undiagnosed disease
- This disease eats away at them day after day, year after year
- Most people are unaware of it
- They spend their entire life trying to fight against it



# *This (and every presentation)*

- There will be exceptions to every rule
- When talking with someone about wealth you'll hear things like
  - *But.. Warren Buffet*
  - *But.. Elon Musk*
  - *But.. Mark Zuckerberg*
  - *But.. but.. but..*
- You're likely not any of the above people..



# *My Journey (not a straight line)...*

- From Broke...
- To \$1M by 29...
- Nearly Broke again by 35...
- To \$10M by 42...
- What Changed?

# *The Big “Ah Ha”*

- Wealth Building is **NOT One Size Fits All**
- There are four distinct “Wealth Personas”
  - Each has their own distinct characteristics
  - Each has their own potential probability of achieving wealth
  - Some have a higher likelihood than others
- When you know your persona you can decipher your flaw(s)
  - When you know your flaw(s) you can change your habits
  - By changing your habits you can increase your likelihood of achieving wealth

# *ISO Wealth: Wealth Persona Worksheet*

- Download at: [www.rcbryan.com/wealth-persona-worksheet](http://www.rcbryan.com/wealth-persona-worksheet) (no email needed)
  - Or just grab a piece of paper and write down your answers
- There are 10 Wealth Persona Traits that define your personal Wealth Persona
  - Let's dive in...

# *Wealth Trait: Time*

- A. I work when I want and play when I want.
- B. I put in my 40-60 hours a week and then spend the rest of my time relaxing and enjoying life.
- C. I'll pull an all nighter If needed. I see my use of time today as an investment in my future.
- D. I block my time off in chunks and do my best to stick to that allocation.

# *Wealth Trait: Spending*

- A. I don't believe in budgets. I spend how I want, when I want and figure everything else out later.
- B. I keep a budget and stick to it most of the time.
- C. I'll make large purchases to motivate myself to go out and earn more money.
- D. I live well below my means by design.

# *Wealth Trait: Investing*

- A. I never have enough money left over after living expenses to invest.
- B. I have a 401k or IRA and I contribute as much to it as I can each year.
- C. I like to make big short term moves so I can earn big rewards.
- D. I invest first and then figure out what I have left over to live off of.

# *Wealth Trait: Debt*

- A. I have more debt that I could pay off today (negative assets).
- B. I use credit cards and carry debt from my personal everyday expenses.
- C. I use debt to help build wealth (leverage).
- D. My only debt is from the purchase of Capital Assets (like real estate or equipment for my business).

# *Wealth Trait: “One Thing”*

- A. I trade my time for income (hourly non-skilled).
- B. Someone else directs my efforts (salary non-owner).
- C. I have multiple skills I use to drive my income. I will go where the money is.
- D. I have a core skill that I have stuck with for years and continue to find new ways to drive income from that skill.



# *Wealth Trait: Risk*

- A. I don't take risks with money because I have none.
- B. I keep it simple and put my extra money into a savings account or mutual funds (maybe an ETF if I'm feeling frisky).
- C. I embrace risk and take big risks all the time. My motto is 'no risk = no reward'.
- D. I avoid unnecessary risk and live by a slow and steady long term growth plan.

## *Wealth Trait: Friends*

- A. I have a social group that I like to hang out with. We gossip, complain about work, our kids, or our significant other.
- B. I have a small group of family and friends that I spend time with. Always small talk; weather, sports, our last vacation.
- C. Most of my friends are industry friends. When we get together, we party and talk about how we'll make money.
- D. I have a small tight group. We never talk about money. You'll catch us having dinners talking politics and religion without wanting to kill each other.

## *Wealth Trait: Fame*

- A. I follow influencers online and dream about being one (or at least living the life of one).
- B. I don't seek fame. I have my social media profiles and try to stay connected.
- C. I am actively working to become an influencer. I put effort into increasing followers and engagement.
- D. I'm not on social media or see little value in it.

# *Wealth Trait: Vision*

- A. I live paycheck to paycheck just to pay my bills.
- B. I have a monthly budget that dictates my life. I don't have a lot of room for a big vision strategy.
- C. I'm pushing hard to get all I can.. NOW.
- D. I move slow and steady knowing that I'm building something big.

# *Wealth Trait: Legacy*

- A. What's a legacy?
- B. I'm saving for retirement, that's about it.
- C. I want to 'leave a mark' on this world. I will be remembered.
- D. I'm building for 2-3 generations from now.

# ***Which Wealth Persona Are You?***

- Tally up your scores for each A, B, C, and D
- Remember there is on wrong answer
- This exercise is to help you understand your potential wealth building capabilities
- Which one do you have the most of?

# Wealth Building Personas

- A. The Spender:** You're living your life and there is nothing wrong with that. You'll likely never accumulate wealth and you're typically ignorant to that fact.
- B. The Non-Seeker:** You're not looking to become wealthy. That is something 'other people' do. You could with a few small changes to your vision change course if you move early enough in life.
- C. The Hunter:** You're aggressively seeking wealth NOW. You have a lower probability than a Gardner but if you do hit it, you'll hit it big.
- D. The Gardner:** You're using a time proven model. It takes discipline and sacrifice. You have a high probability of hitting your number, but it'll be later in life than a Hunter (if they make it).

*Your results may be skewed as questions were not randomized (for the sake of the presentation)*

## *What you need to know if you're a **Spender** or **Non-Seeker***

- If the description from the last slide fits you and you're okay with that, then rock on...
- If you don't agree with the description go back and review the questions and ask yourself if you're truly aligned with your goals
- If you don't like the outcome and want to change your outlook, take a look at the other personas to see where you might need to make adjustments.
- If you want to chat about how to reshape your persona text me 202-738-6344 or email me [wealth@rcbryan.com](mailto:wealth@rcbryan.com) – I want to help



# *What you need to know if you're a **HUNTER***

- Most likely to make it BIG
- Most likely to crash and burn
- It's a more stressful life
- You may struggle with personal relationships
- Most likely to make it BIG in spite of how you spend or live
- Hunters are usually in their 20's and 30's (pre-children)

# *What you need to know if you're a **GARDNER***

- Wealth is almost guaranteed if you stick with it
- Things will often take longer than you like
- You'll often regret risks you didn't take
- You're unlikely to loose it all at any point
- You'll typically have healthier personal relationships
- Those that embrace this persona in their 40's or 50's typically wish they would have done it sooner

# *Creating Your Wealth Plan*

- Download at: [www.rcbryan.com/wealth-worksheet](http://www.rcbryan.com/wealth-worksheet) (no email needed)
  - Or just grab a piece of paper and write down your answers

# Wealth Worksheet

- Start with the first two items at the bottom
  - What is your ‘Wealth Persona Type’
  - What are you Net Assets Today
- Move to the top and work down
  - What is your **Net Worth Goal**
  - What is the date you want to reach that goal
    - How many years do you have
  - What is the “One Thing” you’re going to do reach that goal
  - The Mastermind
    - What do you have to offer the group
    - What do you expect to receive from the group

## ISO WEALTH: Wealth Worksheet

Net Worth Goal

Date You Want to Reach it

Years to Goal

Your “One Thing”

What do you have to offer a Mastermind?

What do you want from the Mastermind?

NET Assets Today

Wealth Builder Persona Type

<https://www.rcbryan.com/wealth-worksheet/> ALL RIGHTS RESERVED © Roger Bryan 2020

# 5 Year Epics

- From your Wealth Worksheet
  - Take the number of years you have until you reach your goal and divide it by 5
- This is the number of Epics remaining until your goal
- What is an Epic?
  - It's an adventure you will embark on
    - Maybe a Project
    - Maybe a Client
    - Maybe a Product
  - It's the mind's way of keeping you motivated along your journey
  - Embrace it...



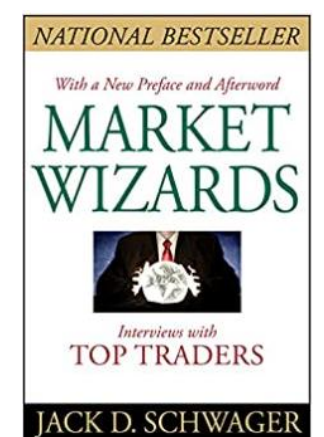
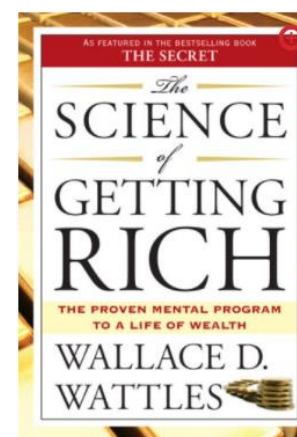
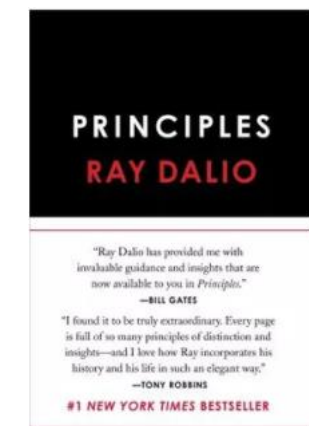
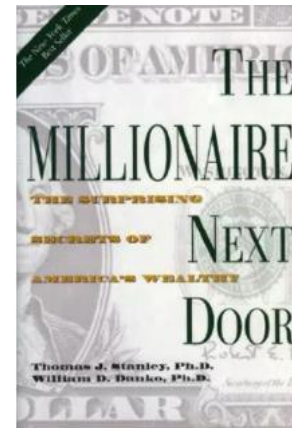
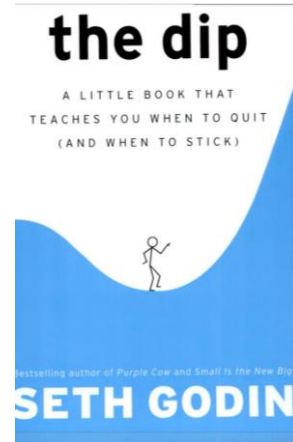
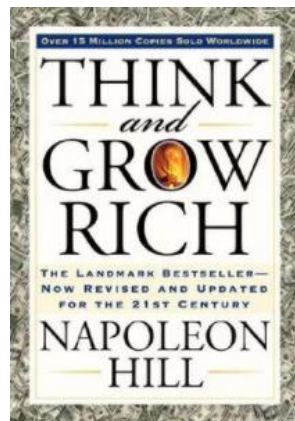
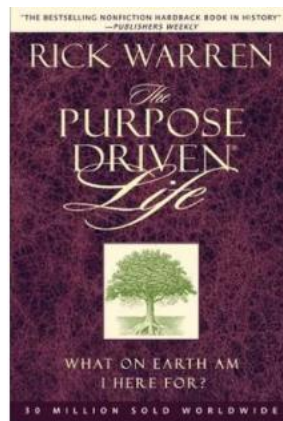
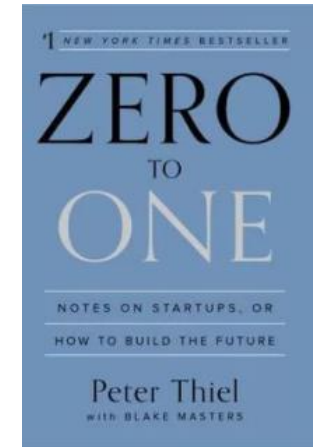
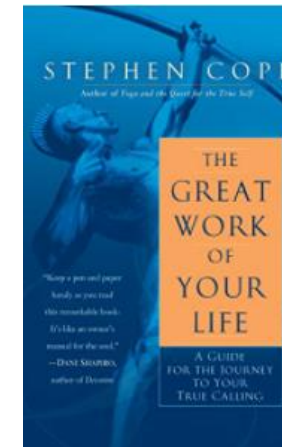
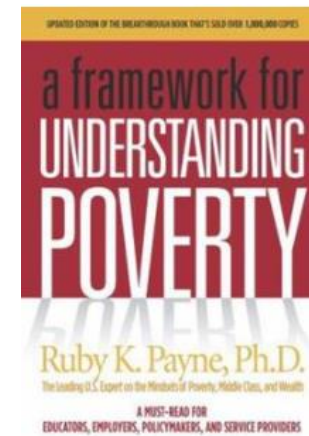
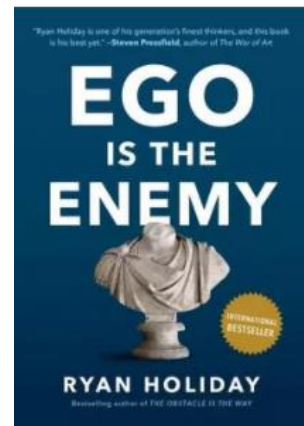
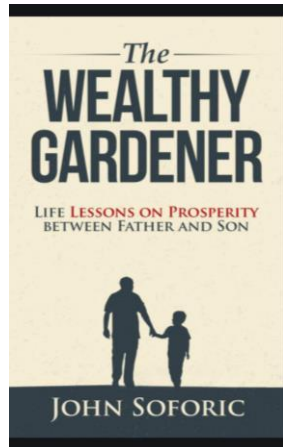
# *A Few Things to Remember*

- You are in control
- You are not 'stuck' in any one persona (unless you choose to be)
- It's never too late to change, it is also easier to change while you're young
- I am here to help... text or email 202-738-6344 [wealth@rcbryan.com](mailto:wealth@rcbryan.com)

# *Roger's 10 Rules for Wealth (Marketer's Edition)*

1. Set a **Goal**
2. Have a **Purpose**
3. Focus on **“One Thing”**
4. Check your **Ego**
5. Be **Consistent**
6. **Invest** First
7. Fail **Fast**
8. **Recurring** Cash Flow
9. **Own** the playing field
10. **Time** is more valuable than money

# A Few Recommended Tools





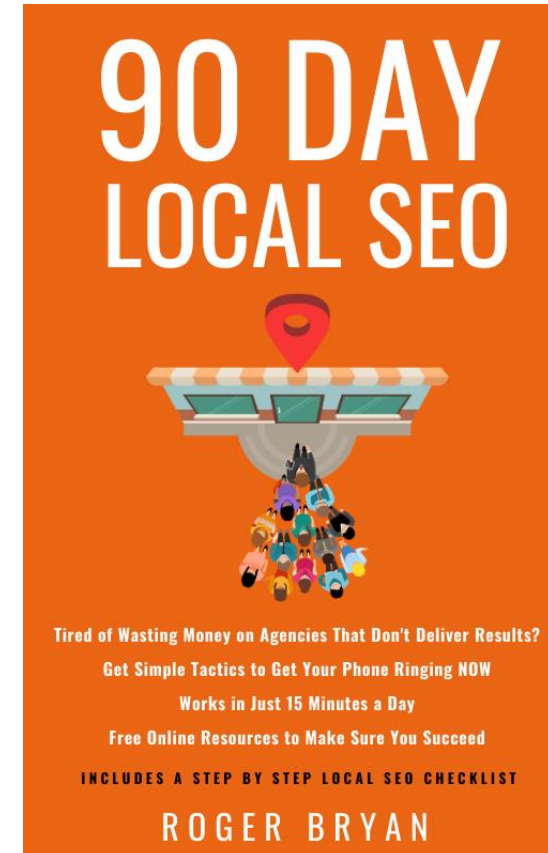
# *If we have extra time...*

- A few personal wealth building tips...

# *Thanks for Joining! BONUS OFFER*

- Email [wealth@rcbryan.com](mailto:wealth@rcbryan.com)
  - Full Name
  - Mailing Address

I'll send you a copy for free when the books is released



*Need Help on Your Wealth Journey?*

# Questions?

Personal Cell 202-738-6344

[wealth@rcbryan.com](mailto:wealth@rcbryan.com)