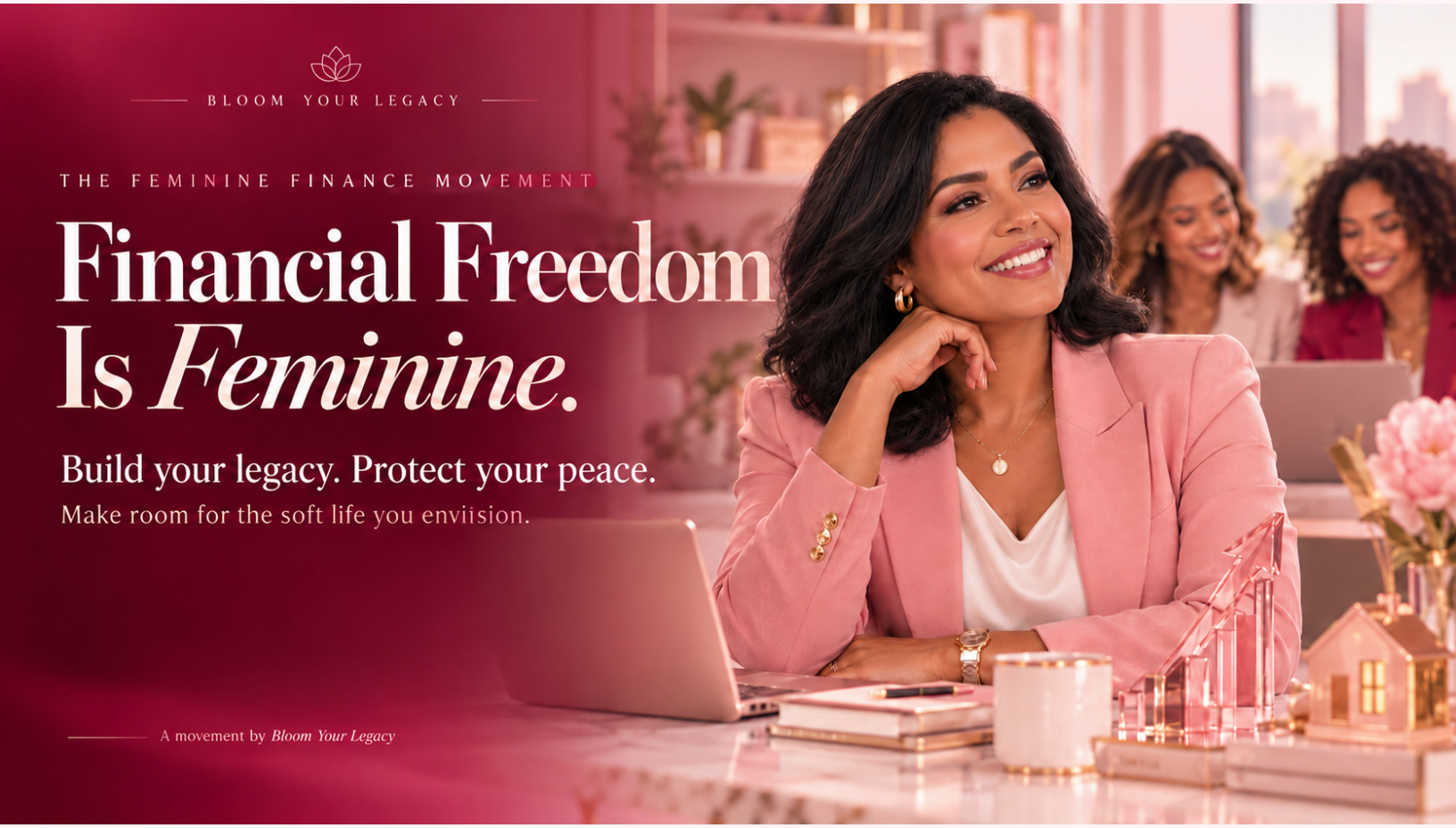

MEMBERSHIP & DIGITAL EXPERIENCE PROPOSAL

A softer life. A *stronger* legacy.

An ongoing membership experience to complement the **Financial Freedom Is Feminine** website and funnel.

Prepared for Alexandra Gomez
Education. Organization. Protection. Progress.

NOVEMBER 2026 / PROPOSED CONCEPT & SCOPE

01 / THE OPPORTUNITY

Turn inspiration into ongoing action.

Extend the website into a place members return to for practical tools, support, and their next step.

The membership promise

Help members organize their money, build consistent financial habits, and prepare to protect the people and future they care about.

A connected brand experience

The website introduces the movement. Bloom Your Legacy gameplay makes financial concepts approachable. The membership helps people apply those lessons in everyday life.

Organize	Budgets, paycheck plans, bills, debt inventories, and monthly planning routines.
Build	Credit education, savings habits, goal tracking, and achievable challenges.
Protect	Insurance education, family information organizers, and preparation for professional conversations.
Leave a legacy	Beneficiary review checklists, document organization, and questions to take to an attorney.

A clear path to the right support

Members choose their own priorities. Relevant resources lead naturally to optional credit consultations, insurance reviews, and LegalShield information.

All features in this proposal are recommendations for discussion. Pricing, delivery commitments, service eligibility, and final development scope remain to be agreed.

02 / THE MEMBERSHIP

A reason to return every month.

A manageable recurring program supported by an expanding library of useful resources.

Monthly planning	A guided money planning session plus a fresh monthly financial planner.
Monthly workshop	Rotate credit education, family protection, financial organization, and legacy preparation topics.
Monthly challenge	A practical savings, spending-awareness, debt-organization, or paperwork challenge.
Resource library	Downloadable tools, mini-courses, workshop recordings, and checklists.
Member community	Accountability prompts, general education, and milestone celebrations.
Quarterly check-in	A structured review of goals, completed actions, and the next priority.
Game connection	Guided Bloom Your Legacy game events with a real-world action worksheet.
Expert perspectives	Guest sessions with appropriately qualified insurance, legal, tax, or other professionals.

Suggested operating rhythm: one planning session, one workshop, and one challenge per month. Record sessions and reuse resources to grow value without rebuilding the program every month.

03 / DIGITAL PRODUCTS

A library with everyday value.

Products can be included in membership, bundled, sold individually, or used as free introductions.

Money planning	Monthly financial planner; annual planner; paycheck budgeting workbook; financial reset starter kit; sinking funds planner.
Debt & savings	Debt organization workbook; payoff scenario worksheets; emergency fund challenge; savings milestone trackers.
Credit education	Credit report review workbook; credit habits tracker; report-reading lessons and an account review checklist.
Life milestones	First apartment readiness kit; homeownership preparation workbook; young adult money starter kit.
Family protection	Policy inventory; family protection organizer; beneficiary review worksheet; agent contact and renewal tracker.
Legacy preparation	Legacy information binder; digital account inventory; attorney consultation preparation kit; identity protection checklist.
Household & business	Couples money meeting kit; small-business financial organizer; annual document and renewal calendar.
Game & learning	Bloom Your Legacy companion workbook; financial confidence mini-course; reflection cards and action challenges.

Suggested formats: fillable and printable PDFs for worksheets; spreadsheets for calculations; short videos for lessons. Digital account organizers should direct members to secure password management rather than collect passwords.

04 / THE SIGNATURE PRODUCT

The monthly financial planner.

A recurring anchor product that turns the membership into a regular financial planning habit.

Included in every edition

Monthly goals, income and paycheck plan, bill calendar, spending categories, savings and sinking funds, debt payments, weekly check-ins, and an end-of-month reflection.

January - March	Financial reset / Couples money planning / Financial paperwork
April - June	Financial literacy / Family protection / Midyear review
July - September	Debt organization / School expenses / Emergency savings
October - December	Credit education / Holiday spending / Legacy review

Make it easy to use

Provide a printable version, a fillable PDF, and an optional spreadsheet. Use the same visual language as the website: wine headings, blush panels, elegant serif titles, and generous white space.

A simple monthly member journey

Download the planner. Attend the planning session. Choose one challenge. Track progress. Reflect and prepare for the next month.

Each edition can also introduce one related worksheet, lesson, and optional service appointment. Recommendations should follow the member's stated interest.

05 / MEMBER APP EXPERIENCE

One login. Useful tools. Clear next steps.

A branded, mobile-friendly portal can bring the membership and service pathways together.

Starting-point assessment	Ask about goals and priorities, then suggest appropriate resources and optional appointments.
Personal action dashboard	Show a short list of next steps, reminders, deadlines, and completed milestones.
Monthly money planner	Record income, bills, savings goals, and spending plans using manual entries initially.
Debt payoff explorer	Compare approaches using member-entered balances, rates, and payment amounts.
Credit habits tracker	Track due dates and balances. Show service status separately for active credit clients.
Protection & legacy checklists	Organize policy review questions, beneficiary tasks, document locations, and attorney preparation.
Resource & booking hub	Access lessons, downloads, game challenges, booking links, and appointment preparation.
Secure intake & assistance	Use an appropriate secure document workflow; an educational assistant can locate approved resources and explain general FAQs.

Build in stages: start with assessments, resources, action tracking, and booking. Evaluate bank connections, bureau integrations, shared household access, and advanced automation after demand is established.

06 / THE FUNNEL

Let each priority guide the next step.

Connect the existing website to relevant resources and appointments without overwhelming visitors.

Website visitor	Sees the Financial Freedom Is Feminine message and chooses a planner, assessment, or introduction to the game.
Free resource	Receives a useful starting tool and selects a priority: money organization, credit, family protection, or legacy preparation.
Relevant follow-up	Receives matching educational content and a clear invitation to membership or an optional consultation, with marketing consent.
Membership onboarding	Gets a starting checklist, relevant resources, a workshop calendar, and a short action plan.
Service pathway	Credit concerns lead to a consultation; protection questions lead to an insurance review; legal preparation leads to LegalShield information.
Ongoing engagement	Monthly planners, challenges, progress reviews, and timely reminders create reasons to return.

Business processes the portal can support

Centralize intake, appointment preparation, reminders, document requests, resource delivery, and service status. Keep sensitive financial and legal details out of open community discussions.

Measure what matters: resource opt-ins, assessment completion, membership conversion, appointment attendance, monthly participation, and retention. Track which pathways produce useful consultations.

07 / MEMBERSHIP & ROLLOUT

Start focused. Grow with your members.

Proposed membership structure and a phased launch; final pricing and scope are not included.

Legacy Starter / Free	Starter planner, brief assessment, sample lesson, and workshop invitations.
Bloom Your Legacy Club	Monthly planners, resource library, money challenges, community, and monthly group planning.
Legacy Circle / Guided	Core benefits plus small-group accountability, quarterly organization check-ins, and additional workshops.

Phase 1 / Launch essentials

Create the monthly planner, financial reset kit, game companion workbook, family protection organizer, and legacy preparation checklist. Launch assessment, resources, action dashboard, and booking.

Phase 2 / Build recurring value

Add the monthly content calendar, member challenges, workshop recordings, onboarding messages, and permission-based follow-up.

Phase 3 / Expand proven features

Add debt tools, credit habit tracking, service status, family collaboration, and integrations where member use justifies the added development and support.

Decisions to finalize together

Choose the launch tier, included support, first five resources, monthly delivery capacity, and portal features. Then confirm pricing, ownership, development scope, and launch schedule.

08 / SERVICE ALIGNMENT

A thoughtful foundation for delivery.

Keep the educational membership clear, useful, and connected to the appropriate professional services.

Membership and service boundaries

Identify credit repair engagements, insurance products, and LegalShield enrollment separately unless a specific arrangement is approved. Verify Alexandra's licenses, available products, applicable states, and associate requirements before publishing.

Credit service structure

Review the actual offer, marketing, contracts, and billing before launch. Federal credit repair rules prohibit advance fees for covered services. Do not promise score increases or removal of accurate, current negative information. A membership label does not settle how the rules apply.

Insurance and legal pathways

MyIntegrity describes its brokerage assistance as free to consumers. Paid membership value should come from the original education, tools, and support. LegalShield benefits vary by plan and location; attorneys provide legal advice. Do not present unconfirmed benefits as included.

Sources and service destinations

Client destinations are provided below for planning. The individual pages were not independently verified in the initial review; confirm current offerings before finalizing public copy.

Aligned Legacy Solutions

Alexandra Gomez / LegalShield

Alexandra Gomez / MyIntegrity

FTC / Credit Repair Organizations Act

FTC / Fixing Your Credit FAQs

MyIntegrity / Brokerage information

LegalShield / Plans and pricing

This proposal is a discussion document, not a commitment to specific benefits, regulatory approval, legal advice, or a guarantee of financial results.