## BSU 2020 = Course Topic Map:

Course 1 / Class 1:  Overview of our background, the dynamics of real estate and equity growth, the basics of compounding wealth, the idea of the 3-sided balance sheet, passive versus active liability management.  In the related coaching session, we unfold the Scenario Desk presentation model, solving products versus problems, and the interview form.
Course 1 / Class 2:  Overview of the Borrow Smart Conversation – to understand House-vs-Home, Safety, Liquidity and Return, EPR and Opportunity Cost.  In the related coaching session, we unfold how this conversation ties into the 7 Concepts, the liabilities on the two-sided balance sheet and how they tie into EPR and creating your hub.
Course 1 / Class 3:  Overview of the book, access to the free recordings of the book, the overview of the 7-Concepts and the 7-Steps, Marketing and Sales, and how to position yourself as a liability advisor and why.  In the related coaching session, we unfold how these Concepts and Steps tie into the model, how to explore case studies to see the broader impact and learning more about the true cost of borrowing.
Course 1 / Class 4:  Overview of the coaching advice mindset, NIFE, and the true cost of renting versus owning – then looked into using presentation software as a tool/resource to connect with advisors.  In the related coaching session, we unfold becoming an expert by focusing each day on their craft, developing the HUB through education, and using Stress Test and 7 Questions resources.

Course 2 / Class 1:  Overview of transition to a liability advisor by looking at rich data in the loan application, the rate-vs-return considerations, how leverage and diversification work in real estate and the impact on return.  In the related coaching session, we unfold the idea of student, profession and working toward mastery – using accountability with yourself and others, and the model of the 7 Concepts to differentiate.  Explored returns and impact of advice.
Course 2 / Class 2:  Overview of the Taxes concept and definitions of qualified residences, the new mortgage interest deductibility, and gain on sale considerations.  How the EPR Gap plays out with examples.  In the related coaching section, we review Property Types against the key tax issues, the tax strategies with examples and 1031 and investment property dynamics to consider with mental triggers for different strategies to consider.
Course 2 / Class 3:  Overview of the 7-Steps with detailed example of each, and direct application of how each can play out during client engagement.  In the related coaching session, we unfold working case studies to practice each of the 7 Concepts within a real-world example of how to engage with a client.
Course 2 / Class 4:  Overview of the 7-Steps at a deeper level – with the sub layer more technical aspects of each one from the book and how to think differently about each step.  This is ties into Jack and Jackie to show the cumulative impact.  In the related coaching session, we unfold the Dunning-Kruger effect, how to layer questions into the 7 Steps that support the concepts of what they are learning to engage.

Course 3 / Class 1:  Overview of the dynamics of the advice market, with Agent, Accountant and Advisors and how they work in their careers, both similarities and differences.  Who they work with, the problems they solve, the way they get paid and the size of their addressable market?   In the related coaching session, we unfold the key types of clients and how we are all looking to build wealth through our decisions, specifically how the advisory role is the same, but talked about through different lenses.
Course 3 / Class 2:  Overview of transitioning to a Certified Liability Advisor and moving to Liabilities Under Management as a focus through data, recurring revenue growth, and using their knowledge to build a vast network using the FAST System.  In the related coaching session, we unfold examples of building that network, and practicing what they have learned on recent client interactions with examples of future impact, and how to use the FAST Communications strategy.
Course 3 / Class 3:  Overviews the shift in perspective to being a liability advisor, and uses this shift to clarify how their role can change through a variety of engagements – using case studies we apply what they are learning and how it will help others.  In the related coaching section, we review how to apply the Pin/Fin model to better manage their own financial wellbeing and further build their confidence.
Course 3 / Class 4 (GRADUATION Part I and II):  Overview as a summary all the of the key concepts discovered, and the importance of engaging a few key ideas now as they integrate these ideas over time.  After a review of the key highlights, the final Graduation Coaching sessions is about the mindset needed to change their own financial lives and begin to support others in mastering liabilities into assets.