



DECEMBER 2025

CALIBRATE &
COMMIT:

YOUR FINANCIAL RESET



WORKBOOK

THE WEALTH FINISHING SCHOOL

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Welcome to December!

Just like the traditions and gatherings that close out the year, December invites us to pause, reflect, and reset.

Inside The Wealth Reset, this month is all about Calibrate & Commit — Your Financial Reset.

Looking back with honesty helps you move forward with clarity. This month, you'll review your 2025 journey, identify key lessons, strengthen your systems, and cast a powerful vision for 2026.

Reflection is not about judgment — it's about alignment.

Reflection:

What clarity do I need to bring into the new year?

Dr. Pamela Tolly



In our family, reunions were a cherished part of our summer fun. When I introduced the NarrowRoad™, I began initiating conversations about family wealth. These discussions led to ongoing dialogues every summer and during family gatherings about various topics, including retirement, college and career planning, home ownership, entrepreneurship, and overall wealth building.

One of my classmates reached out for assistance with her family business, which inspired the creation of the Family Business Product. This initiative helps families utilize their reunion time to elevate their business standards towards achieving wealth. Family truly is the greatest!

DEC 2025

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MONTHLY PLANNER

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

TO DO

[illegible]

GOALS

[illegible]



DECEMBER 2025

WEEK 1

LOOK BACK TO MOVE
FORWARD



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REFLECTING ON YOUR 2025 FINANCIAL JOURNEY

What were my financial wins this year?

Where did I struggle – and why?

What patterns defined my 2025?

Looking back gives you the clarity to look ahead.” —
Dr. Pamela Jolly



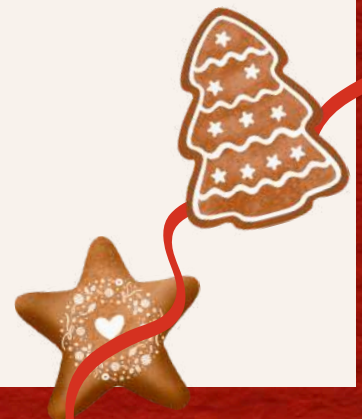


DECEMBER 2025 WEEK 2

FIND THE GAPS. KEEP THE LESSONS.



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HONEST REVIEW CREATES REAL GROWTH

What were the biggest gaps in my systems or habits this year?

What lessons do I want to carry into 2026?

What new needs emerged in my financial journey?



DECEMBER 2025 WEEK 3

PREPARE YOUR SYSTEMS
BEFORE JANUARY



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SYSTEMS PROTECT YOUR PROGRESS

Which systems need upgrading for 2026?

What can I automate to create ease and consistency?

Which system will I strengthen or start before January 1st?

“Your confidence tomorrow comes from the systems
you build today.”



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WEEK 4

DESIGN THE FIRST CHAPTER OF
YOUR 2026 STORY



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VISION-CASTING FOR THE YEAR AHEAD

What do I want my 2026 wealth chapter to look like?

How will my values guide my goals?

What systems will support the future I'm creating?



MY MASTER PLAN PLEDGE

What is one financial discipline I will commit to practicing in 2026?

What mindset or old habit will I leave behind in 2025?

Who can support and hold me accountable?

“The future is shaped by the plans you put in place today.”
— Dr. Pamela Jolly



THINGS MY FAMILY TAUGHT ME

Growing up, the holiday season was a time of reflection in my family — a moment to share stories, gratitude, and hopes for the year ahead. My grandmother often said, “Clarity is the greatest gift you can give yourself before a new season.” My father would add, “And consistency is the gift you give your future.”

Those lessons shaped how I learned to prepare for a new year.

Each December, I revisit my plan — not to chase perfection, but to reaffirm purpose. Preparing for a new financial season is not about predicting the future; it’s about equipping yourself to meet it with strength.

The truth is simple:

The new year rewards those who enter it prepared.

As you complete this workbook, remember — your wealth story is not defined by the past year, but by the clarity, systems, and vision you take into the next one.

See You in January!

SEE YOU NEXT YEAR!

ANCHORING TO AN OUTCOME YOU BELIEVE IN

Think of one truth you're carrying into 2026 – something you deeply believe your wealth should help make possible.

Write it here, then ask:

What is one step I can take this month to make that truth my reality?

Merry
Christmas

