

INCOURAGE LIFE

YEAR 2021-2024

MILLIONAIRE MINDSET MIXER 2021-2024 IMPACT REPORT

LATEST INFORMATION AND UPDATES
ABOUT THE MILLIONAIRE MINDSET MIXER
A FINANCIAL WEALTH BUILDING EVENT



**PREPARED BY:
CHANTIE COWANS**



A WORD FROM THE FOUNDER

CHANTIE COWANS
FOUNDER

When we created the Millionaire Mindset Mixer, we did so with a simple belief: access to financial knowledge, resources, and meaningful conversations about wealth can change what people believe is possible for themselves, their families, and their communities.

Across four years of Millionaire Mindset Mixer experiences, we brought people together around one shared purpose—to create, manage, and build wealth. Through education and conversations spanning various areas of finance and wealth building, we created a space where individuals and families could gain knowledge, ask questions, connect with professionals, discover resources, and begin thinking differently about their financial futures.

But this work has never been about hosting an event simply for the sake of hosting an event.

It is about impact. It is about creating access to information that has not always been equally accessible. It is about helping people move beyond simply surviving financially and begin having conversations about ownership, protection, investing, legacy, and generational wealth.

Across each Millionaire Mindset Mixer, the participation and engagement reinforced something we already knew: our communities are hungry for financial knowledge and ready for opportunities to build differently.

As we reflect on the impact created through the Millionaire Mindset Mixer, we also recognize that this is only the beginning.

In 2027, the Millionaire Mindset Mixer returns—building upon the foundation we've created and expanding our commitment to financial education, wealth building, and generational impact. Incurage Life remains committed to creating spaces where financial education meets empowerment, resources meet opportunity, and individuals are encouraged to see wealth not simply as something reserved for a select few—but as something they can intentionally learn to create, manage, protect, and pass forward.

We are proud of what we have built together, grateful to every speaker, partner, volunteer, and participant who has contributed to this work, and excited about where we go from here.

The goal isn't simply to talk about wealth. The goal is to help create more people who know how to build it.



WORKING TOGETHER TO CLOSE THE WEALTH GAP

THE FACTS

The wealth gap in the United States did not happen by accident. For generations, historically underserved communities have faced barriers to homeownership, access to capital, quality financial education, investment opportunities, business ownership, and other tools used to create and transfer wealth.

Historical and systemic barriers have shaped access to financial education, homeownership, capital, and wealth-building opportunities across generations. While progress has been made, the effects of unequal access can still be seen today in differences in household wealth, homeownership, financial security, and the ability to build and transfer generational wealth. But closing the wealth gap requires more than acknowledging that it exists.

It requires access. It requires education. It requires strategy. And it requires action.

That is where Incentive Life believes we can make an impact. Through the Millionaire Mindset Mixer, we bring financial professionals, wealth-building strategies, resources, and conversations directly into the community—creating an environment where individuals and families can learn about the tools available to them, ask questions, make connections, and take actionable steps toward building wealth.

The gap is bigger than income. Earning more money is important, but income alone does not create wealth. Wealth is also built through ownership, investing, protection, entrepreneurship, access to financial resources, and the ability to preserve and transfer assets across generations. The disparities we see today remind us why this

- The difference between the middle class minority household and other middle class households—is around \$164,000
- Minority families have the lowest percent % of homeownership than any other race
- 46% of minority families remain underinsured

These are more than statistics. They represent families. They represent opportunity. And they represent the work still left to do. The Millionaire Mindset Mixer exists to help change that story—one conversation, one resource, one strategy, and one family at a time.

INCOURAGE LIFE

YEAR 2021-2024

The Millionaire Mindset Mixer Financial Wealth Building Initiative was created from a commitment to expanding access to the knowledge, resources, and opportunities that help individuals and families build wealth.

We recognize that access to financial education and wealth-building resources has not always been equal across communities. The Millionaire Mindset Mixer was created to help close that gap by bringing education, financial professionals, practical strategies, and resources directly to the communities we serve.

Our mission is to empower individuals and families with the knowledge and tools to make informed financial decisions, create greater financial security, build wealth, and begin creating a legacy for future generations.

Through conversations surrounding money management, credit, homeownership, investing, insurance and protection, entrepreneurship, estate planning, and other areas of wealth building, participants are introduced to strategies that can help them move from simply managing their finances to intentionally creating wealth.

At Incourage Life, we believe access to the right information can change what people believe is possible.

The Millionaire Mindset Mixer is our commitment to creating that access—bringing education and opportunity together in one room and empowering people to take what they learn and put it into action.





FOUR FUNDAMENTAL ACCOUNTS

3. Wealth-Building Accounts

Goal: Retirement Funds

- Roth or Traditional IRA*
- 401(k), deferred comp, tax-sheltered annuity (TSA), etc.*

100%

of attendees report that they will return for the next year's event.

88%

of attendees took action to improve their financial situation after the event.

OUR FINANCIAL IMPACT

The impact of the Millionaire Mindset Mixer extends beyond the conversations that happen in the room. Our goal has always been to help participants turn financial education into real action toward building, protecting, and creating wealth.

Across our programming, the Millionaire Mindset Mixer has connected individuals and families with financial education, professionals, resources, and strategies designed to help them take meaningful steps toward their financial goals.

Impact at a Glance

\$15,000 - Raised to support financial education and community programming.

250- Individuals and families reached with financial education and wealth-building resources.

100- New life insurance policies established, helping individuals and families take steps toward protecting their financial futures.

35- New investment portfolios opened, helping participants begin or expand their journey toward building long-term wealth.

45- Individuals who took action to successfully reduce their debt.

25- Families who began taking steps toward homeownership.

These numbers represent more than financial transactions.

They represent individuals taking action.

Families protecting what they are building.

People beginning to invest.

Debt being reduced.

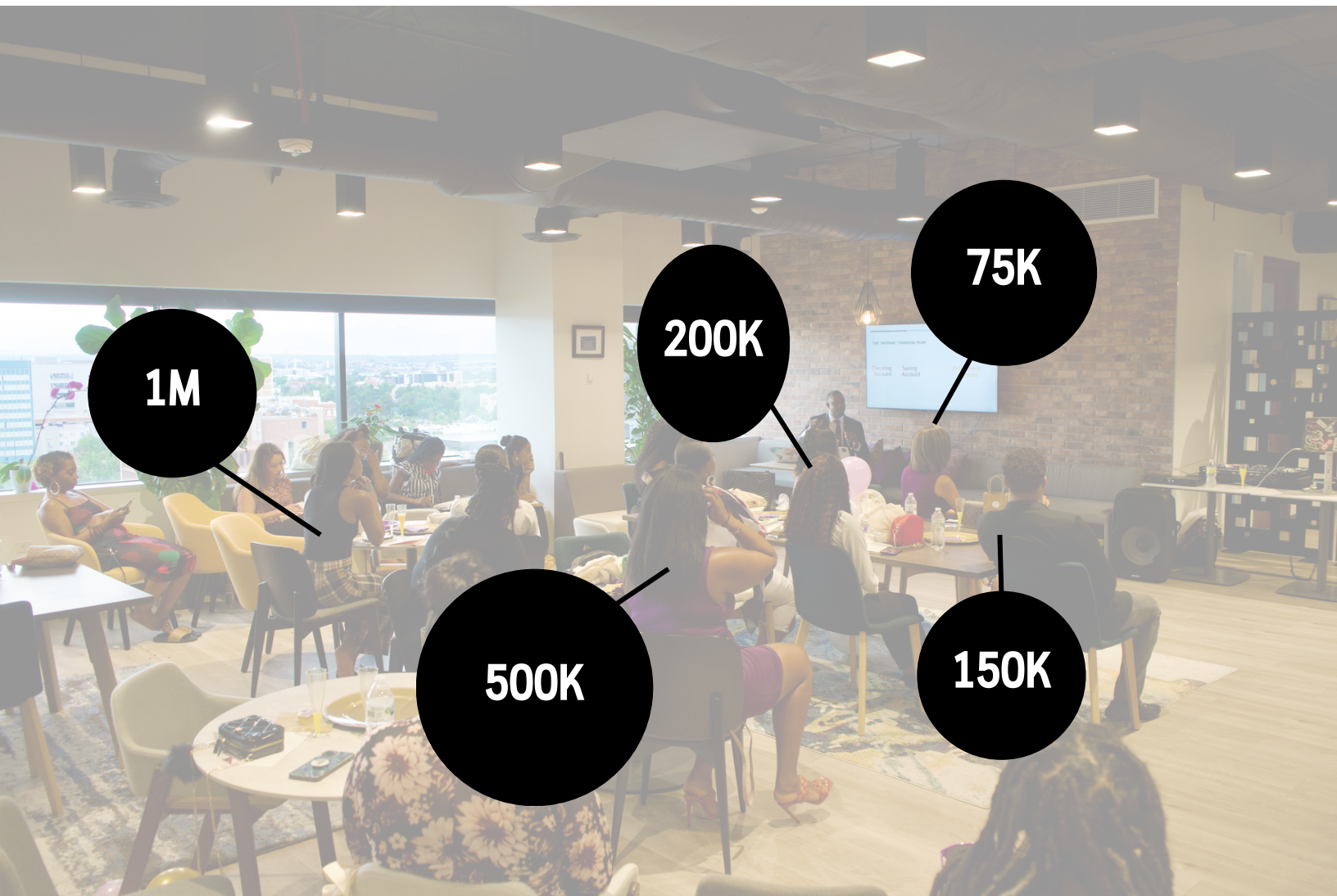
And families beginning the journey toward homeownership.

That is what financial empowerment looks like when education becomes action.

We are grateful to the speakers, sponsors, volunteers, financial professionals, community partners, and participants who helped make this impact possible.

Together, we are creating greater access to the information and resources that can help individuals and families create, manage, protect, and build wealth.

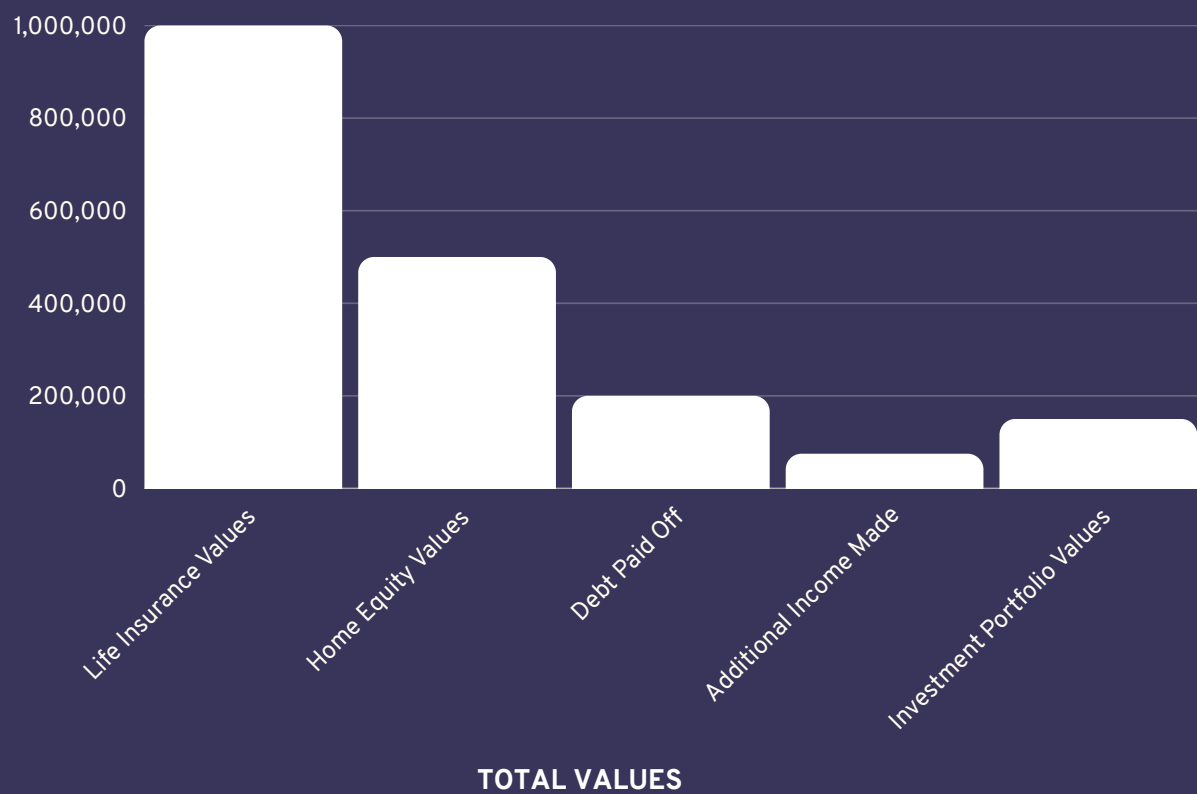




A YEARLY REVIEW

The amount of impact is tremendous. Over the past four years, the Millionaire Mindset Mixer has helped hundreds of individuals achieve their financial goals. When we break down each area, we can see that this financial wealth building event has added millions of dollars in net worth back into the community.

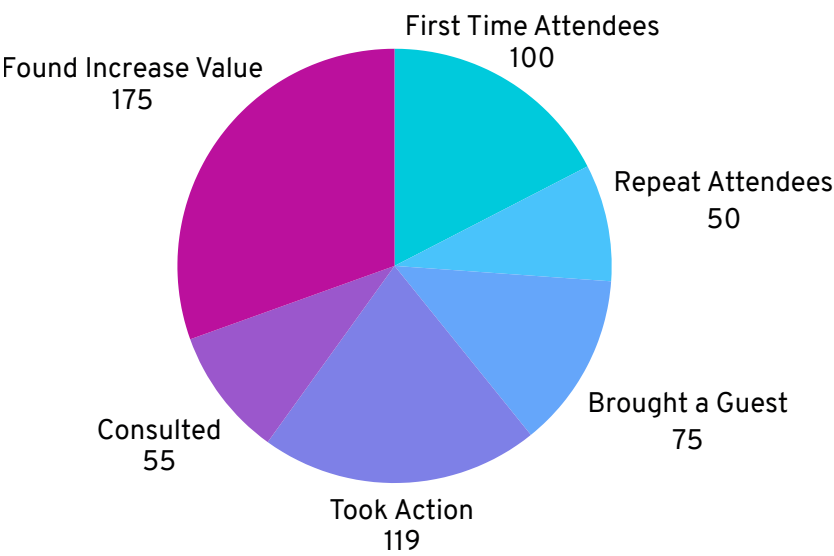
By helping participants eliminate and manage debt, increase income, lower liabilities and secure assets, we have achieved major financial milestones, catapulting the wealth and closing the gap in our communities.



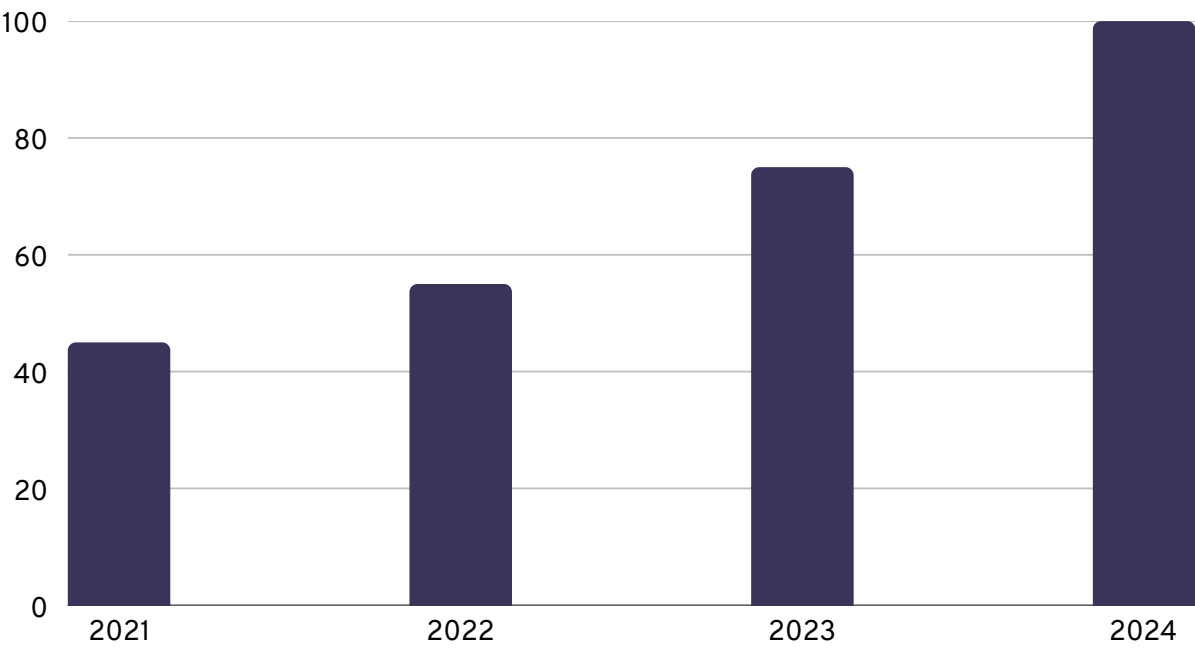
STATISTICS

AVERAGE PER HELPED HOUSEHOLD

- The average amount of newly issued life insurance policies was \$100,000
- The average amount of debt paid off was \$200,000
- The average amount of additional monthly income increased by \$75,000
- The average monthly contribution to investment accounts increased by \$200.00
- The average amount of home equity increased by \$200,000
- The average net worth increased by \$100,000



Number of attendee who



Number of attendees per year.
2027 is projected based on patterns

Four Ways to Earn Income

CASH FLOW QUADRANT*

EMPLOYEE

Has a job.
Income based on position, not the person.

BUSINESS

Owens a system. Has others working for him/her.
Unlimited income potential via manufacturing, marketing, etc.

SELF-EMPLOYED

Owens a job.
Dentist, doctor, lawyer, hair stylist, real estate agent, salesperson.

INVESTOR

Has money working for him/her.
Enjoys complete freedom and lives the dream.

What stops them from making the transition?

Where are most people?

Which two ways to earn income appeal to you the most?

*The Cash Flow Quadrant, CASH FLOW Technologies, Inc.; used with permission.
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2M

\$2,000,000 of net worth was added back into the minority community as a direct result of the Millionaire Mindset Mixer - Financial Wealth Building event.

100M

An additional \$1,000,000 dollars was issued in life insurance policies to families and individuals based on attendee referral program.

25%

Of attendees became licensed in the financial service industry, allowing them to make extra income, and increased the representation of minorities in the financial industry.

45%

Took additional efforts to further their financial literacy and education. Increasing their families knowledge on the topic to help aid in securing generational wealth.



2027 GOALS

INCREASE FUNDING BY 100%

Raise \$30,000 to facilitate the 2027 Annual Millionaire Mindset Mixer

INCREASE ATTENDEES BY 25%

100 additional attendees at the 2027 Annual Millionaire Mindset Mixer

INCREASE NET WORTH BY 1M

As a result of the Annual Millionaire Mindset Mixer, an additional \$1,000,000 dollars of net worth will be added back into the our communities.

INCREASE PARTNERSHIPS BY 50%

Sponsorship and partnerships will increase by 50% in 2027. Five additional partnerships will be added to the 2027 Annual Millionaire Mindset Mixer.



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