



REGATTA FINANCIAL

THE NAVIGATOR SERIES · THE MONTHLY PROMISE

MONTH _____ YEAR _____

THE MONTHLY PROMISE

Wealth is created by **YOU** and your habits, not the price of an ounce, a share, or someone else.

SAY IT OUT LOUD

“Good morning. You are loved and supported.”

“I will do everything in my power to see that I am well off — for my legacy, my health, and the ones I love most.”

THIS MONTH, I WILL

- ☐ Put something aside before anything else gets it.
- ☐ Learn one thing about my own money.
- ☐ Do one thing for my body, one for my peace of mind.
- ☐ Do one thing for someone I love, while they can enjoy it.

ONE NUMBER I WILL KNOW BY MONTH'S END

What leaves this household each month:

WHERE THE PROMISE GOES

Legacy _____
Health _____
The ones I love _____

A goal can be abandoned. A promise is owed to someone, and the someone is you, at the far end of this.

Education only. Not individualized advice, and not a recommendation to buy, sell, or hold any security or asset. Regatta Financial LLC, a registered investment adviser, is fee-only for investment advisory services and receives no commissions on investment transactions. Investing involves risk, including possible loss of principal. Advisory services offered only where registered or exempt. Form ADV Part 2A and Form CRS: [adviserinfo.sec.gov](https://www.adviserinfo.sec.gov) · CRD #333067 · v1 · 2026



REGATTA FINANCIAL

THE NAVIGATOR SERIES · THE MONTHLY PROMISE

MONTH _____ YEAR _____

THE MONTHLY PROMISE

Wealth is created by **YOU** and your habits, not the price of an ounce, a share, or someone else.

SAY IT OUT LOUD

“Good morning. You are loved and supported.”

“I will do everything in my power to see that I am well off — for my legacy, my health, and the ones I love most.”

THIS MONTH, I WILL

- ☐ Put something aside before anything else gets it.
- ☐ Learn one thing about my own money.
- ☐ Do one thing for my body, one for my peace of mind.
- ☐ Do one thing for someone I love, while they can enjoy it.

ONE NUMBER I WILL KNOW BY MONTH'S END

What leaves this household each month:

WHERE THE PROMISE GOES

Legacy _____
Health _____
The ones I love _____

A goal can be abandoned. A promise is owed to someone, and the someone is you, at the far end of this.

Education only. Not individualized advice, and not a recommendation to buy, sell, or hold any security or asset. Regatta Financial LLC, a registered investment adviser, is fee-only for investment advisory services and receives no commissions on investment transactions. Investing involves risk, including possible loss of principal. Advisory services offered only where registered or exempt. Form ADV Part 2A and Form CRS: [adviserinfo.sec.gov](https://www.adviserinfo.sec.gov) · CRD #333067 · v1 · 2026



REGATTA FINANCIAL

THE NAVIGATOR SERIES · THE MONTHLY PROMISE

MONTH _____ YEAR _____

THE MONTHLY PROMISE

Wealth is created by **YOU** and your habits, not the price of an ounce, a share, or someone else.

SAY IT OUT LOUD

“Good morning. You are loved and supported.”

“I will do everything in my power to see that I am well off — for my legacy, my health, and the ones I love most.”

THIS MONTH, I WILL

- ☐ Put something aside before anything else gets it.
- ☐ Learn one thing about my own money.
- ☐ Do one thing for my body, one for my peace of mind.
- ☐ Do one thing for someone I love, while they can enjoy it.

ONE NUMBER I WILL KNOW BY MONTH'S END

What leaves this household each month:

WHERE THE PROMISE GOES

Legacy _____
Health _____
The ones I love _____

A goal can be abandoned. A promise is owed to someone, and the someone is you, at the far end of this.

Education only. Not individualized advice, and not a recommendation to buy, sell, or hold any security or asset. Regatta Financial LLC, a registered investment adviser, is fee-only for investment advisory services and receives no commissions on investment transactions. Investing involves risk, including possible loss of principal. Advisory services offered only where registered or exempt. Form ADV Part 2A and Form CRS: [adviserinfo.sec.gov](https://www.adviserinfo.sec.gov) · CRD #333067 · v1 · 2026



REGATTA FINANCIAL

THE NAVIGATOR SERIES · THE MONTHLY PROMISE

MONTH _____ YEAR _____

THE MONTHLY PROMISE

Wealth is created by **YOU** and your habits, not the price of an ounce, a share, or someone else.

SAY IT OUT LOUD

“Good morning. You are loved and supported.”

“I will do everything in my power to see that I am well off — for my legacy, my health, and the ones I love most.”

THIS MONTH, I WILL

- ☐ Put something aside before anything else gets it.
- ☐ Learn one thing about my own money.
- ☐ Do one thing for my body, one for my peace of mind.
- ☐ Do one thing for someone I love, while they can enjoy it.

ONE NUMBER I WILL KNOW BY MONTH'S END

What leaves this household each month:

WHERE THE PROMISE GOES

Legacy _____
Health _____
The ones I love _____

A goal can be abandoned. A promise is owed to someone, and the someone is you, at the far end of this.

Education only. Not individualized advice, and not a recommendation to buy, sell, or hold any security or asset. Regatta Financial LLC, a registered investment adviser, is fee-only for investment advisory services and receives no commissions on investment transactions. Investing involves risk, including possible loss of principal. Advisory services offered only where registered or exempt. Form ADV Part 2A and Form CRS: [adviserinfo.sec.gov](https://www.adviserinfo.sec.gov) · CRD #333067 · v1 · 2026