



THE MENOPAUSE CATALYST™

FREE MENOPAUSE APPOINTMENT TOOLKIT

"Menopause is inevitable. Financial disruption is not."

By Siam Maxie

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WELCOME

How To Use This Toolkit

Welcome — I'm so glad you're here.

I'm Siam Maxie — 34 years in mortgage banking and financial services, and the founder of The Menopause Catalyst™. I built this toolkit after years of watching brilliant, high-performing women walk into appointments unprepared, not because they weren't smart, but because no one ever told them this transition has a financial side too.

This isn't just a symptom tracker. It's the first step in a bigger framework I teach — one built around three things menopause quietly touches: the decisions you second-guess at work, the money you spend chasing relief that doesn't work, and the long-term wealth gap this season can open up if it goes unmanaged. I call them The Decision Gap, The Money Drain, and The Equity Bridge.

This toolkit lives in the first pillar — getting you clear, organized, and heard in the exam room. What it costs you outside that room is a conversation for another day, and I hope you'll let me have it with you.

How to use it

- Bring this toolkit — printed or digital — to every healthcare appointment related to your perimenopause or menopause care.
- Fill out the Symptom Tracker (page 3) in the days leading up to your visit so you arrive with real patterns, not just memory.
- Use the Doctor Conversation Guide (page 6) to make sure your most important questions actually get asked.
- Log every visit in the Medical & Insurance Summary (page 4) so you build a running record over time.
- Revisit the Recommended Tests Checklist (page 5) at each appointment to track what's been discussed, ordered, and completed.

You are not overreacting. You are not “too much.” You are paying attention — and that is exactly what this season requires.



TRACK

Symptom Tracker

Track your symptoms as they happen. Patterns you might miss day-to-day often become obvious once they're written down — and that's exactly what helps your provider help you. (Notice, too, what these symptoms are costing you in focus, time, and money. That's a conversation worth having — just not with your doctor.)

Symptom	Frequency	Severity (1–10)	Notes





RECORD

Medical Visit & Insurance Summary

Use one block per appointment. Over time, this becomes your personal record — co-pays, labs, and follow-ups, all in one place.

VISIT 1	
Appointment Date _____	Provider _____
Co-Pay _____	Lab Work Ordered _____
Follow-Up Needed _____	Insurance Notes _____
Questions Asked / Answers Received _____	

VISIT 2	
Appointment Date _____	Provider _____
Co-Pay _____	Lab Work Ordered _____
Follow-Up Needed _____	Insurance Notes _____
Questions Asked / Answers Received _____	



Recommended Tests Checklist

Bring this list to your appointment and ask your provider which of these are appropriate for you. Use the columns to track where each one stands.

Test / Screening	Discussed	Ordered	Completed	Results In
FSH (Follicle-Stimulating Hormone)	☐	☐	☐	☐
Estradiol	☐	☐	☐	☐
Thyroid Panel (TSH, Free T4)	☐	☐	☐	☐
Comprehensive Metabolic Panel	☐	☐	☐	☐
Lipid Panel	☐	☐	☐	☐
Vitamin D	☐	☐	☐	☐
A1C / Fasting Glucose	☐	☐	☐	☐
Bone Density Scan (DEXA)	☐	☐	☐	☐
Mammogram	☐	☐	☐	☐
Pap Smear / Pelvic Exam	☐	☐	☐	☐
Cortisol	☐	☐	☐	☐
Testosterone	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐



Doctor Conversation Guide

These questions exist so nothing important gets lost in a 15-minute appointment. Check off each one as you ask it, and jot the answer underneath.

What tests do you recommend to evaluate my hormone levels?

Could my symptoms be perimenopause, menopause, or something else?

What treatment options are available, and what are the risks and benefits of each?

How will this treatment interact with medications I'm already taking?

What changes should I expect over the next 6–12 months?

How can I manage brain fog, memory changes, or difficulty concentrating?

What should I know about bone health, heart health, and long-term risk?

When should I follow up, and what would prompt an earlier visit?



Medication & Supplement Tracker

Every prescription, hormone therapy, and supplement in one place — so you and every provider you see have the full picture.

Medication / Supplement	Dosage	Purpose	Side Effects	Questions



REFLECT

Notes & Next Steps

MY NEXT 3 STEPS

1. _____
2. _____
3. _____





YOU'VE HANDLED THE APPOINTMENT.

Now let's handle what it's costing you.

This toolkit got you prepared, organized, and heard by your provider. But menopause doesn't just show up in the exam room — it shows up in your paycheck, your promotions, your savings, and your peace of mind.

That's where The Money Drain — my full financial audit for this season of life — picks up where this toolkit leaves off.

THE 3 PILLARS

The Decision Gap • The Money Drain • The Equity Bridge

Ready to see your full financial picture?

siammaxie.com

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