

Design Your Life Worksheet

Ideally, where would you like to live? _____

How much would that cost to: Rent \$ _____ per week, or, Buy \$ _____ Total Cost

What kind of car would you like? _____

How much would that cost to: Lease \$ _____ per month, or, Buy \$ _____ Total Cost

Would you like to have some other assets (boat/plane/bike/toys)? _____

How much would that cost to: Lease \$ _____ per month, or, Buy \$ _____ Total Cost

How many holidays would you like to take per year? _____

How much would that cost: \$ _____ per year, $\div 52 =$ \$ _____ per week

What are your lifestyle expenses, per week:

Essential

Food \$ _____

Clothes \$ _____

School Fees \$ _____

Kids Expenses \$ _____

Health Care \$ _____

Home Expenses \$ _____

Motor Vehicle Use \$ _____

Pets \$ _____

Telephone & Internet \$ _____

Subscriptions \$ _____

Insurances:

- Life \$ _____

- Income \$ _____

- Property \$ _____

TOTAL \$ _____

Luxury

Restaurants \$ _____

Entertainment \$ _____

Sporting Fees \$ _____

Alcohol \$ _____

Cigarettes \$ _____

Other Addictions \$ _____

TOTAL \$ _____

Total Weekly Income Required \$ _____

Total Equity Chunk Required \$ _____

Where are you now?

PPR:

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____

Investment Properties:

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____ Cash Flow Pos/Neg: \$ _____

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____ Cash Flow Pos/Neg: \$ _____

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____ Cash Flow Pos/Neg: \$ _____

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____ Cash Flow Pos/Neg: \$ _____

Valued: \$ _____ Owing: \$ _____ Equity: \$ _____ Cash Flow Pos/Neg: \$ _____

Total Property Equity \$ _____ **Total Property Cash Flow** \$ _____

Liquid Assets:

- Cash \$ _____

- Shares \$ _____

- Managed Funds \$ _____

Non Liquid Assets:

- Cars \$ _____

- Boats/Bikes/Toys \$ _____

- Gold/Valuables \$ _____

- Business Assets
(if saleable) \$ _____

- Super/Pensions
(only if able to access) \$ _____

Total Equity Now \$ _____ **Total Cash Flow Now** \$ _____

Desired Cash Flow \$ _____ /week Desired Cash Flow \$ _____ /year

Cash Flow Now \$ _____ /week Cash Flow Now \$ _____ /year

Deficit \$ _____ /week **Deficit** \$ _____ /year

Desired Equity Debt Free \$ _____

Equity Now \$ _____

Deficit \$ _____

Notes: