

# 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: \$ \_\_\_\_\_

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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: