



WHAT IS YOUR FINANCIAL PLAN?

1. *When would you like to stop having to work?*

- | | |
|--|---|
| <input type="checkbox"/> In one year | <input type="checkbox"/> In ten years |
| <input type="checkbox"/> In two years | <input type="checkbox"/> In _____ years |
| <input type="checkbox"/> In five years | |

Great! What's your plan to achieve this?

2. *How much money do you want monthly to do this comfortably?*

- | | |
|----------------------------------|---|
| <input type="checkbox"/> \$2,000 | <input type="checkbox"/> \$10,000 |
| <input type="checkbox"/> \$5,000 | <input type="checkbox"/> \$15,000 or more |

Great! What's your plan to achieve this?

3. *How much money would you need to invest at a 6% return to receive my desired monthly income?*

(Take answer from question #2 and multiply by 200. For a 5% return multiply by 240.)
(For a 4% return multiply by 300. 3% return multiply by 400. 2% return multiply by 600. **OUCH!**)

- | | | | | |
|-----------------------------------|---|-------|---|-------------|
| <input type="checkbox"/> \$10,000 | x | 200 | = | \$2,000,000 |
| <input type="checkbox"/> \$ _____ | x | _____ | = | \$ _____ |

Great! What's your plan to achieve this?

HOW ARE YOU DOING? DO WE NEED TO TALK?

"There are two types of people in this world:

- People that have to go to a job to get paid, and
- Those that don't.

Which group would you like to belong to?"

What would you do with more income? What would more income mean to you?

Signed: _____ Date: _____