

Survival Numbers (monthly)

Housing (rent or mortgage): _____
 Utilities: _____
 Food: _____
 Telephone: _____
 Gas: _____
 Insurance: _____
 Car Payment: _____
 Credit Card Payments: _____
 Loan Payments: _____
 Other (): _____
 Other (): _____
 Taxes: _____
 Survival Sub-Total: _____

A Better Lifestyle (monthly)

Debt reduction: _____
 (how much by when ÷ no. mos.)
House down payment: _____
 (how much by when ÷ no. mos.)
Savings: _____
 (how much by when ÷ no. mos.)
Car: _____
 (how much by when ÷ no. mos.)
Investment property: _____
 (how much by when ÷ no. mos.)
Other (): _____
 (how much by when ÷ no. mos.)
Other (): _____
 (how much by when ÷ no. mos.)
 Future Needs/Lifestyle SubTotal: _____
 Survival Sub-Total: _____
Monthly Grand Total: _____

Average income
last six (6) months ...

IMPACT



average

Target income next six (6)
months ...

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Prioritize your
motivations ...

- Progress
- Recognition
- Security
- Family
- Competition
- Duty
- Achievement