



The Playbook of Wealthy People

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FINANCIAL GOALS:

1. _____
2. _____

SAVINGS NOW
WEEKLY HRS _____

Current Position:	Monthly Salary:	Age:	Months to 65:	Income At 65:
Current Position:	Monthly Salary:	Age:	Months to 65:	Income At 65:



If cannot work?

Total Earnings At 65:

MONEY = WORK

WORK = ENERGY + TIME

If need more money?



Relationships Training Skills Professional Growth
Family Business Education Spiritual Growth
Health Investments Hobbies Personal Growth

WEALTH

$\$27.50$ per day X 365 days X 10 years = $\$100,350$

LIFESTYLE = MONEY + DAILY ACTIVITIES & LIFE EVENTS

What did I spend money on?

(Daily activity & amount that makes you use money)



Example: \$9.50 lunch at work or \$14.99 Car wash

Asset/Liability	Growth		Income		Protection		Debt		Tax Advantage	
	Yes	No	Yes	No	Yes	No	Yes	No	100%	Somehow
Home										
Business										
Pension										
401K										
403b										
IRA										
Roth IRA										
Car										
Life Ins										
Car Ins										
Annuities										
Investments										
Other/Credit										

	YES	NO
Did I spend on what I value the most?	_____	_____
Does it improve quality of life?	_____	_____
Rank the importance	High	Low
Did I GAIN WEALTH?	_____	_____

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Financial Planning

Do I wealth it?
or
Do I waste it?

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WEALTH

Activities/events that require the use of your energy, time & money, & that lead to improved quality of life.