

Your Magic Number Worksheet



Let go of need. You already have what you need.

Get clear on what you want and get after it.

Be honest and unapologetic. You want it just because you want it, and that is to be celebrated.

UPGRADE:

What is it that you have, that you want to upgrade?

Cues: your house, car, health?

And what is the cost to upgrade?

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HAVE:

What do you want to have that you don't have yet?

Cues: Have you always wanted a holiday home, a sports car, a particular piece of jewellery or art? You are only limited by your own imagination

What is the cost to get it?

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EXPERIENCES:

What do you want to experience that you currently don't experience?

Cues: How often do you want to holiday and where? How do you want to travel?

Where do you want to stay? What events/experiences do you want to attend?

What is the cost to have these experiences?

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LIFESTYLE:

How do you want your lifestyle to be different?

Cues: Where do you want to go for dinner and how often?

What do you want your perfect week to look like?

How do you want to dress differently?

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What is the cost to have your ultimate lifestyle?

FINANCIAL FREEDOM DATE AND ASSET TOTAL:

Cues: When do you want to declare financial freedom? Choose an exact date where you will celebrate financial freedom.

And what do you want your total investments and assets to be so that you can have financial freedom?

N.B use this number to reverse engineer the next section.

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CONTRIBUTE TO YOUR WEALTH CREATION:

How much do you want to invest into your wealth creation?

Cues: How do you want to approach your wealth creation differently?

How does your financial advisory/accounting team/support/planning need to be different?

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Now you know your magic number, how much extra do you need to earn per year after tax to achieve it?
