



Design **YOUR WEALTHY LIFE**

WORKBOOK - PART 1

“ Living wealthy does not happen by accident, it’s created intentionally. ”

BONNIE KOO

DESIGN YOUR WEALTHY LIFE

What do I want? What do I desire?

Areas to consider: Environment, Relationships: partner, kids, other family, friends), Career, Spiritual, Health, and Money.

I want...

Why? Why is this important to me? What emotion(s) come up?

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On a scale of 1-10, how is your life now? Pick the first number that pops into your head. Don't overthink it!

How much money do I want?

I want ...

What I you want money for?

I want money for ..

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On a scale of 1-10, how is your current money situation? Pick the first number that pops into your head.

What do you think is the hardest part about having or making more money for you? Of having the life you really want?

Are you willing to make your 10/10 life a reality?

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Now, let's gather some numbers. Feel free to add other categories for your situation.

Current Debt (if any):

Current Income:

Current home value (if you own):

Current balance in retirement accounts including brokerage accounts:

Other assets (can list amount/value and/or income revenue as appropriate):

Now, what would you like these to look like instead?

Future Debt (if any):

Income:

Future home value (if you own):

Future balance in retirement accounts including brokerage accounts:

Future assets (can list amount/value and/or income revenue as appropriate):

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Assets

Liabilities

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Income

Overhead

