

Name: \_\_\_\_\_

## Here and now!

Why I am here today \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

My annual contract amount is \$ \_\_\_\_\_ . That is

\$ \_\_\_\_\_ per month ( $\frac{\text{green line}}{12}$ ) and

\$ \_\_\_\_\_ per hour ( $\frac{\text{green line}}{40}$ ).

I made approximately \$ \_\_\_\_\_ in prize money  
this year.

## Total Earnings

This year my total earnings are \_\_\_\_\_ (*green line + yellow line*).

## Savings

I saved \$ \_\_\_\_\_ this year. That is \_\_\_\_\_ %

( $\frac{\text{pink line}}{\text{total earnings}}$ ) of what I earned.

## Summary of annual basic expenses:

Housing \$ \_\_\_\_\_ (*rent or mortgage* × 12).

Food \$ \_\_\_\_\_ (groceries, eating out, coffee runs, etc....don't forget those late night runs for snacks).

Car and Car Insurance \$ \_\_\_\_\_.

Taxes \$ \_\_\_\_\_.

Family ? \$ \_\_\_\_\_.

Agent \$ \_\_\_\_\_.

My total basic expenses are \_\_\_\_\_ (*total of red lines*)

This means I have \$ \_\_\_\_\_ (*blue dotted line* – *black dotted line*)

leftover after my basic expenses are covered.

## Life after Sport

If I were to stop earning money now, I think I can live \_\_\_\_\_ years on my savings. This means I'm spending \$ \_\_\_\_\_ ( $\frac{\text{pink line}}{\text{purple line}}$ ) per year to live.

After sport, I would enjoy a career in \_\_\_\_\_. I can earn \$ \_\_\_\_\_ per year doing this job. That is \$ \_\_\_\_\_ per

month ( $\frac{\text{green line}}{12}$ ) and \$ \_\_\_\_\_ per hour ( $\frac{\text{green line}}{40}$ ). My Health

Insurance costs \$ \_\_\_\_\_ per month. That is \$ \_\_\_\_\_

(*red line* × 12) annually. Which is \_\_\_\_\_ % ( $\frac{\text{yellow line}}{\text{green line}}$ ) of my income.

## Retirement

I would like to retire at age \_\_\_\_\_ . I am currently \_\_\_\_\_ years old.

This means I have \_\_\_\_\_ (*blue line – maroon line*) years until I retire. I think I

will live until I am \_\_\_\_\_ years old, which means I will be retired for

\_\_\_\_\_ years (*purple line – black line*). When I retire I would like to have

\$\_\_\_\_\_ per year to live. In order to achieve that, I will need to have

\$\_\_\_\_\_ (*black dotted line × red dotted line*) before I retire. I

should save \$\_\_\_\_\_ (*green line × black line*) per year to have enough

money in retirement.

To prepare for this, I am putting \$\_\_\_\_\_ into a SEP IRA, 401(k),

Traditional or Roth IRA.

## Be Mindful

**Housing:** My mortgage (use rent if you don't have a mortgage) is \$\_\_\_\_\_

per month. That is \$\_\_\_\_\_ annually (*red line × 12*). My loan term is \_\_\_\_\_

years. I will pay roughly \$\_\_\_\_\_ (*blue line × purple dotted line*) for

my house.

**Credit:** I last pulled my credit report on \_\_\_\_\_. My credit score is \_\_\_\_\_.

**Taxes/Budget:** I am saving \_\_\_\_\_ % of every dollar I earn specifically for

taxes. I am using \_\_\_\_\_ to monitor my budget.

**Building your Financial Entourage:**

Financial planner: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Accountant: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bookkeeper: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Daily money manager: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_