

My to do list for the week beginning: / /
In the next 7 days I will have achieved / completed...

Priority	Goal	To Do	Now Doing	Date Done

In the next 30 days I will have achieved / completed...

Priority	Goal	To Do	Now Doing	Date Done

My Investing Focus Board

Μv	Portfolio	Name:	Date:	1	1

Address & Description	Growth/ Income	Active/ Passive	Net Purchase Price (A)	Current Value (B)	Loan Owing (C)	Net Equity (B-C)	Cash In (D)	Cash Out (E)	Cashflow (D-E)
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
Date acquired:			\$	\$	\$	\$	\$	\$	\$
			\$	\$	\$	\$	\$	\$	\$

Book 3 Survey Summary

Question	Answer
A) How many more years are you planning to work in full time employment?	
B) How much annual before tax income do you need in order to live a comfortable lifestyle?	
C) Assuming your investments return *% per annum (before tax), how much in total net assets do you need to generate enough income for you to fund your retirement? (Q B divided by 0.08)	
D) How much in total net investment assets do you have at the moment?	
E) What is your current surplus or shortfall in investment assets needed to generate an 8% return (before tax)? (Q D – Q C)	
F) Assuming that you acquire the shortfall in assets evenly, how many assets do you need to acquire each year over your remaining working life? (Q E divided by Q A)	

Steve McKnight Survey

Year Score	Category
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My Financial Goals

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