



15 Numbers You Need to Track

1. Monthly Expenses = _____

2. Monthly Net Pay = _____

3. \$ in Emergency Fund = _____

4. Total Amount of Debt = _____

5. Total Amount of Assets = _____

6. Your Net Worth = Total Assets - Total Liabilities

Net Worth = _____

7. \$ Saved for Retirement = _____

8. \$ Saved Each Year for Retirement = _____

9. How Much \$ Do You Need to Retire =

$$\frac{\text{Annual Income You Need} - \text{Social Security}}{4\%}$$

$$\text{Example: } \frac{\$60,000 - \$20,000 \text{ SS}}{4\%} = \$40,000$$

= \$1,000,000 Needed to Retire

10. What % of Your Investments are Growth = _____

11. At this pace how much \$ will you have = _____

12. List Out Your Big Goals - What % have you saved?

Example: Kids Education - \$100,000 Goal - 40% saved

1. _____ -- _____ -- _____% Saved

2. _____ -- _____ -- _____% Saved

3. _____ -- _____ -- _____% Saved

13. Monthly amount of passive income? = _____

14. How much are you worth dead? = _____

15. How many in your circle of trust : _____

- Attorney :
- Accountant:
- Financial Advisor:
- Banker:
- Friend / Coach:

Notes : _____



Step 1 - Cash Flow Statement



Income

Expenses

Income	Expenses



Step 2 - Net Worth Statement



Assets

Liabilities

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Assets - **Liabilities** = **Net Worth**

_____ - _____ = _____

Debt Snowball - List Debt in Order of Attack

Name of Debt

Balance

Payment

% Rate

Pmts Left

Name of Debt	Balance	Payment	% Rate	Pmts Left



Check out these other videos on the School of Personal Finance YouTube channel.



Thanks for downloading and let me know if you need any help.

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