

You work hard year after year for something. Let's bring that something to life by naming it. In the top line enter your goal – retirement, buy another business, kids in college, etc. Then guesstimate the amount of money it will take to accomplish your goal. This is now known as your transferrable value. The amount of money you need to transfer from your business to you. The result will be the amount you need to set aside each year to make it a reality.

I want to: \_\_\_\_\_

It will cost:

## You Need

If for retirement calculate annual income needed and multiply by 25 years.

## You Have

Amount you currently have set aside for your goal.

## You're Short

## Years Left To Work

The number of years between now and the time you want to accomplish your goal.

## You Need To Save

Re-enter the number you were short in the above calculation.

## Can You Save?

Divide the number you need to save by the number of years left to work.

# Results Driven Planning Model Worksheet

From the Start With The End In Mind Calculator

This worksheet helps you connect your transferrable value amount to real life. Now that we know how much money we need to fund your future, let's take a look at our business to see if we can achieve it.

Start With "Can You Save?"

Add (+) Anticipated Taxes and Interest

Subtract (-) Anticipated Other Income

Result (=) Operating Profit Needed

Add (+) Total Operating Expenses

Result (=) Needed Gross Profit Dollars

Divide (/) Current Gross Profit Margin Percentage

Result (=) Sales Required To Hit Savings Goal