

Walk Away Fund™

Name:

Date:

Your Walk Away Fund™ is a fund that you will setup, which is designed for the morning you wake up and decide you're done! Whether you're a business owner, CEO, or salesperson.

Know your "why" in setting up your Walk Away Fund™. Is it to spend time with family and no longer have to work? Your health is failing? Maybe you just had enough! Take the book side of this page and really think about "why" you'd like to setup your Walk Away Fund™.

To complete your Walk Away Fund™, complete the following steps:

1. Your Net Worth Statement - Quick Down & Dirty Guide

Assets		Liabilities	
Cash		Real Estate	
Securities		Personal	
Cash Value		Business Loan	
Pension Assets		Misc.	
Business			
Real Estate - Personal		Net Worth:	
Real Estate - Investment		Cash (90 Days)	
Personal Items		Net Worth Excluding Businesses Owned:	
Misc.			

2. Budget: Current Walk Away

Expenses	Amount	Walk Away
Home		
Food		
Transportation		
Travel		
Insurance		
Charity		
Kids/Grandkids		
Misc.		
Total:		

3. Monthly Number needed to live
\$ _____

Multiply by 12 \$ _____

Lump Sum needed
at 5% to equal annual
expenses
\$ _____

4. Take lump sum needed above,
subtract net worth excluding
businesses - this will equal output
or surplus used for Walk Away
Fund™.



Put number in Step 3.