

# Worksheet:

## My Personal Goals

### My motivation for wanting to invest in real estate is

I want to own real estate because

*Hint: provide a defined monthly cash flow because I hate working 9-5. Generate an immediate lump sum of cash through doing deals to help me buy some properties. Supplement my retirement. I want to be financially independent with option to retire early at 50. Be as honest as possible.*

### Short Term Goal

In \_\_\_\_ months, I want to

### Medium Term Goal

In \_\_\_\_ months, I want to

### Long Term Goal

In \_\_\_\_ years, I want to



**Which do you need more in the coming year, a lump sum or monthly cash flow? Why?**

**How much time do you have to invest each week?**

**How much money do you have to invest?**

At this moment I have \_\_\_\_\_

Within the next \_\_\_\_\_ months, I could have another \_\_\_\_\_

**Can you get financing? How much can you borrow?**

