

BALANCED WEALTH. BALANCED LIFE

MODULE 2 WORKSHEET: FINANCIAL INSIGHT



STEP 1

Enter the amounts of the different expenses and calculate the total.

50	Living	Insurance policies	Transport
	Rent/mortgage payments Municipal tax Water board tax Service costs Energy Internet + TV Home maintenance Mobile Other:	Car insurance Travel insurance Home insurance Legal insurance Health insurance Funeral insurance Life insurance Other:	Motor vehicle tax Fuel Breakdown assistance Maintenance Road tax Other:
	Subtotal:	Subtotal:	Subtotal:
			TOTAAL

30	Subscriptions	Variable expenses	
	Gym/sports club Streaming Lottery and charities Digital services Other:	Grocery shopping Clothes Self-care Holidays Hospitality Fun activities	Gifts Alimony Other:
	Subtotal:		Subtotal:
			TOTAL

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Debts

Student loan
Credit card debt
Other:

Subtotal:

Saving and investing

Savings
Shares
2nd home
Other:

Subtotal:

TOTAL

Income

Income
Salary
Tax benefits
Receipt of alimony
Company
Investment (savings, investing, real estate)
Other:

Subtotal:

TOTAL

STAP 2

Discover your financial situation. If your income is higher than your expenses, you can start accumulating your wealth. Then proceed to Module 3 to discover which type of wealth accumulation suits you.