

JG' Wealth Plan 2011

Security, Plan A

7-figure income

College funds: Create plan with Jill for \$200k for ea. Kid by 18 yrs old

Complete remodel

Open bow boat

Landscape from ideal plans

Master bedroom & office addition (Pay cash for ALL material & labor)

\$2500 a mo. into retirement so I can have 4 million at 65 yrs old (equivalent to \$2 mil. Now)

On call Nanny

\$50k in cushy fund as back up

Make double house paymts every mos.

Auto-deductions for tax pymts

SUV

Keep \$3k in cash in house

Two 2-week vacations a year

Kick ass time share- Marriott

Comfort, Plan B

BushHawk XP plane/hangar at Concord to fit it + RV

BMW M5-down pay \$20k+ or cash PIF

Full time personal assistant

\$100,000 in cash account

\$100,000 in savings for each kid (for wedding/home)

House directly on the water with deck and dock space for parents/in-laws if needed

Boat to keep at house for Salt water/bay

Airport car at PML

RV

Benicia house PIF (keep for kids)

Pay off PML house

Pay off dad's boat

Vacation Home

House on water at Delta or Lake Don Pedro

Buy mom a new van

Raw land purchase in beautiful spot to develop later or now

Vacation 3+ months of year

True Extreme Wealth, Plan C

\$10,000,000 a year from my businesses

I only work to delegate, create and have fun

King Air or other fast 8-person plane with a giant hangar for all of our toys

8+ month vacation to either drive or sail the world
Create or buy profitable resort
Mom & Dad's debt PIF

Jeanna's Wealth Plan 7/12/06

Security, Plan A

Make a plan and implement to attract \$1,000+ a day or more immediately from my biz

\$60,000+ in savings (non-retirement) for a rainy day that never comes ;-)

\$2500 a mo. into retirement so I can have 4 million at 65yrss old (equivalent to \$2 mil. Now)

Only debt: BMW M5/house on the water (\$100,000+ down) with dock for float plane

All bills are paid on time or early

Pay cash for everything

House fully furnished in a way that is utterly pleasing

Tower for boat

\$10,000+ a month in passive income

\$20,000+ a month in addition to Steve's income/dividends/bonuses

Reliable, creative, aggressive, loving, professional, efficient, positive staff

Comfort, Plan B

Float plane

Work with financial planner, cpa monthly to strategize, implement wealth plan

Grow MP, AA to \$1,000,000+ a year each (distribution house for all hard goods)

\$100,000 in cash account

\$50,000 in savings for each kid

House expanded or move to bigger house directly on the water

Boat to keep at house, keep Centerion at Disco Bay dry dock year round

5 seat, faster plane, hangar for it at Concord

Airport car at PML

Vacation Home

Rental home with positive cashflow

Start new family biz we LOVE with Steve, JJ, Mom...profitable first year

Raw land purchase in beautiful spot to develop later or now

Vacation 3+ months of year

True Extreme Wealth, Plan C

Passive income exceeds expenses x2

\$10,000,000 a year company

I only work to delegate, create and have fun

Enough money is an account for each child to match them for purchase of car,
home and pay for their weddings
King Air or other fast 8 person plane with a giant hangar for all of our toys
8+ month vacation to either drive or sail the world
5 rental properties with positive cashflow
Create or buy profitable resort

Previous Plan:

Security:

All cc's paid in full
6 mos. living expenses in savings
Monthly automatic deductions for max. IRA, est. tax pyments,
vacation fund and investments
Boat & car paid in full
Live in beautiful house with Steve with at least 20% down pay
Own hangar and plane
Flyings lessons paid for in full as I go
All bills paid for in full early each mo.
Pay cash when shopping for food, gifts, services, clothes, treasures,
furniture
House fully furnished
Book keeper comes every mo.
Coach for me, always, trade or paid
Taking classes to enhance my business
Produce AOP on Cd
Rack on boat w/ speakers

Comfort:

Buy vacation home/used for rental
Buy duplex/townhouses for rental
Inc. AA & MP
Raw land purchase
Buy or create a new service biz (cleaners, B & B, small restaurant,
franchise, etc.)
Buy new boat/car/plane/helicopter
Increase auto deductions for all saving/investment funds
Expenses for one year in savings
Set up college funds for our kids
Passive income exceeds expenses two-fold
Multi-millionaire
AA Retreat Center

Pay for any outing we go on w/ parents, JAM, Webb's

True Wealth:

Buy/build hotel resort

Buy/build home w/ view, waterski lake, landing strip

Billionaire

Yacht

AA opens several retreat resorts

Pay cash for anything we want

Home on east coast and Europe

Exotic car

Buy homes for both parents and brother