

JG Wealth Plan 2013

Security, Plan A

Living Trust/Will (Both Steve & I)

Auto-deductions for tax pymts – break it down per mos. and JFDI

Create Wealth Plan with Todd

\$50k Recurring monthly revenue (It's scheduled to come in)

Increase Auto payments into College funds to insure tuition for top choice school

Make double house paymts every mos.

New couch

Finish Patio, stucco, kitchen, fireplace, master bath

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

P/T Personal Assistant in Benicia

\$50k biz savings

Keep \$5k in cash in house

Rent a place on Delta with hyrda hoist, dock, deck near home/fast water

Two 2-week vacations a year

Decide on JG's ideal car – buy it

Decide on ideal ski boat – buy it

Comfort, Plan B

Full time personal assistant (separate from VA)

Landscape from plans

Office cottage down the hill

Nanny for vacations

Quarterly projects for charity with family

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

Kick ass time share- Marriott? World Mark?

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

BMW M5or kick Audi down pay \$20k+ or cash PIF (if not bought in Plan A)

\$100,000 in cash account – not through Jill

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

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

Boat to keep at house for Salt water/bay

RV

Benicia house PIF (keep for kids)

Pay off PML house

Pay off dad's boat

Vacation Home on lake within 2.5 hours
Buy mom a new van, if she wants one
Raw land purchase in beautiful spot to develop later or now
Mom & Dad's debt PIF
Take mom on 1 lavish vaca a year
Vacation 3+ months of year

True Extreme Wealth, Plan C

I only work to delegate, create and have fun
4 -bedroom house near Squaw Valley PIF
Enough invested that I could live on interest alone if I so chose for the rest of my life
FT fix it dude (General Contractor)
Float plane
King Air or other fast 8-person plane with a giant hangar for all of our toys
Create or buy profitable resort
Cabin Cruiser