



PERFORM

Resource Allocation to Drive Change



Balance Sheet Data

Data	
Age (Now)	
Retirement Age	
Value of current Home	
Amount owing on Home (For Home)	
Amount needed to upgrade to "Peak House" + additional Major Lifestyle Spend (Boat)	
Desire Annual Lifestyle cost in retirement	
Total Net Value of Financial Assets	

Balance Sheet Data

Data	
Age (Now)	
Retirement Age	
Value of current Home	
Amount owing on Home (For Home)	
Amount needed to upgrade to "Peak House" + additional Major Lifestyle Spend (Boat)	
Desire Annual Lifestyle cost in retirement	
Total Net Value of Financial Assets	

