

“Need Number” Worksheet:

This worksheet will help you figure out how much money you need to make each month so you know what to set your money goals for in your business. Include everything you can think of that you need to pay for each month, personal and business and most importantly include things you know you need but aren't yet paying for (such as a new computer, shopping cart, membership in a networking group or organization, marketing materials, an assistant, new website, coach, training program, etc.); these will be critical to your success.

MONTHLY EXPENDITURE (for entire household):	FEE OR COST PER MONTH (Divide annual fees):
1. Mortgage / Rent	1. _____
2. Vehicle payment (boat/camper, etc.)	2. _____
3. Car / Home / Life Insurance	3. _____
4. Gas	4. _____
5. Medical Insurance / Dental / Other	5. _____
6. Other Medical / Prescriptions / Co-Pays	6. _____
7. Utilities – SMUD (Electric)	7. _____
a. PG & E (Gas)	a. _____
b. Television	b. _____
c. Cable	c. _____
d. Internet	d. _____
e. Netflix / Other	e. _____
f. Other _____	f. _____
8. Phone – Home / landline	8. _____
a. Cell phone (s)	a. _____
b. Office	b. _____
9. Groceries	9. _____
10. Eating Out	10. _____
	TOTAL PAGE ONE \$ _____

MONTHLY EXPENDITURE

(for entire household):

- 11. Household repair / updates / necessities
- 12. Legal
- 13. Pet food / care / boarding
- 14. Child care / child transportation
- 15. Club memberships (Costco, etc.)
- 16. Hair / nails / self-care / massage
 - a. Gym / trainer
- 17. Personal needs – clothing / shoes
 - a. Electronics
 - b. Supplements / Health
 - c. Other _____
 - d. Other _____
- 18. Loan - Student
 - a. Loan - Other
 - b. Credit card 1
 - c. Credit card 2
 - d. Credit card 3
- 19. Travel (Business or Personal)
 - a. Airfare
 - b. Hotels
 - d. Food expenses
 - e. Gifts
- 20. Business Investments – Coaching
 - a. Program 1 _____
 - b. Program 2 _____
 - c. Membership 1 _____
 - d. Membership 2 _____
 - e. Membership 3 _____
 - f. Membership 4 _____
 - g. Website – Design

FEE OR COST PER MONTH

(Divide annual fees):

- 11. _____
- 12. _____
- 13. _____
- 14. _____
- 15. _____
- 16. _____
 - a. _____
- 17. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
- 18. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
- 19. _____
 - a. _____
 - b. _____
 - d. _____
 - e. _____
- 20. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
 - f. _____
 - g. _____

TOTAL PAGE TWO \$ _____

MONTHLY EXPENDITURE

(for entire household):

- i. Hosting
- ii. Updates
- iii. Software
- iv. Credit card fees

h. Services – Email marketing/cart

- i. Back up service
- ii. Social posting
- iii. Bookkeeper / CPA
- iv. Virtual Assistant 1 _____
- v. Virtual Assistant 2 _____
- vi. Attorney
- vii. Other coach _____

i. Live event / room rental / AV

j. Networking event fees

k. Office space fees

l. Client Gifts

m. Direct mail / Postage / Shipping

n. Marketing Materials – Design

- i. Printing
- ii. Posters / Signs / Banners
- iii. Other _____

o. Other _____

p. Other _____

q. Other _____

r. Other _____

21. Care of others (parent, etc.)

a. College for kids.

b. Other _____

FEE OR COST PER MONTH

(Divide annual fees):

i. _____

ii. _____

iii. _____

iv. _____

h. _____

i. _____

ii. _____

iii. _____

iv. _____

v. _____

vi. _____

vii. _____

i. _____

j. _____

k. _____

l. _____

m. _____

n. _____

i. _____

ii. _____

iii. _____

o. _____

p. _____

q. _____

r. _____

21. _____

a. _____

b. _____

TOTAL PAGE THREE \$ _____

MONTHLY EXPENDITURE

(for entire household):

- 22. Investments – Real estate
 - a. Other _____
- 23. Add to Savings _____
- 24. Vacations _____
- 25. Other _____
- 26. Other _____
- 27. Other _____
- 28. Other _____
- 29. Other _____
- 30. Other _____

FEE OR COST PER MONTH

(Divide annual fees):

- 22. _____
 - a. _____
- 23. _____
- 24. _____
- 25. _____
- 26. _____
- 27. _____
- 28. _____
- 29. _____
- 30. _____

TOTAL PAGE FOUR \$ _____

PAGE 1 + PAGE 2 + PAGE 3 + PAGE 4

TOTAL PAGE ONE \$ _____ **+**

TOTAL PAGE TWO \$ _____ **+**

TOTAL PAGE THREE \$ _____ **+**

TOTAL PAGE FOUR \$ _____ **=**

TOTAL NEED # / MONTH \$ _____

WANT # / MONTH \$ _____