



This isn't a budget. This is a vision.

Most people ask 'What can I afford?' That's the wrong question. The right question is: 'What do I actually want?' Once you know your target, we can reverse-engineer the income, investments, and strategy to get there.

Instructions: Fill in the monthly cost for each category based on your IDEAL life — not what you currently have, but what you genuinely want. Be honest. Be bold. No judgment.

HOUSING & HOME	Monthly Cost
Mortgage/Rent	\$ _____
House Cleaning	\$ _____
Home Maintenance/Repairs	\$ _____
Internet & Cable	\$ _____
Utilities (Electric, Gas, Water)	\$ _____
Alarm/Security System	\$ _____
Other: _____	\$ _____

TRANSPORTATION	Monthly Cost
Car Payment(s)	\$ _____
Gas/Fuel	\$ _____
Car Insurance	\$ _____
Car Maintenance/Repairs	\$ _____
Toll Roads/Parking	\$ _____
Uber/Lyft/Rideshare	\$ _____
Other: _____	\$ _____

PERSONAL CARE & WELLNESS	Monthly Cost
Hair Appointments	\$ _____
Nails/Mani-Pedi	\$ _____
Massage/Spa Services	\$ _____
Gym/Fitness Membership	\$ _____
Personal Trainer	\$ _____
Cosmetics/Skincare	\$ _____
Toiletries	\$ _____

FOOD & DINING	Monthly Cost
Groceries	\$ _____
Restaurants/Dining Out	\$ _____
Personal Chef/Meal Prep	\$ _____



IDEAL ME WORKSHEET

Design Your Dream Life. Then Build the Financial Plan to Make It Happen.



Book Free 30-Min Call

FOOD & DINING	Monthly Cost
Coffee/Tea/Drinks	\$ _____
Other: _____	\$ _____

LIFESTYLE & ENTERTAINMENT	Monthly Cost
Entertainment/Events	\$ _____
Hobbies/Activities	\$ _____
Streaming Services	\$ _____
Books/Courses/Learning	\$ _____
Gifts & Celebrations	\$ _____
Hosting Events/Parties	\$ _____
Other: _____	\$ _____

CLOTHING & ACCESSORIES	Monthly Cost
Clothes & Shopping	\$ _____
Shoes	\$ _____
Accessories/Jewelry	\$ _____
Other: _____	\$ _____

FAMILY & PETS	Monthly Cost
Childcare/School	\$ _____
Pet Care/Grooming	\$ _____
Pet Food/Supplies	\$ _____
Family Support/Parents	\$ _____
Other: _____	\$ _____

TRAVEL & VACATIONS	Monthly Cost
Vacation Savings	\$ _____
Weekend Getaways	\$ _____
Travel Expenses	\$ _____
Other: _____	\$ _____

GROWTH & DEVELOPMENT	Monthly Cost
Workshops/Conferences	\$ _____
Coaching/Mentoring	\$ _____

Dickey Financial Services & Wealth Management Firm

(346) 683-2511 • info@dickeyfinancial.com • www.dickeyfinancialfirm.com

Instagram: @dickeyfinancialfirm | Facebook: /dickeyfinancialfirm | LinkedIn: /in/bridgett-dickey

Listen to our podcast: *Sis, Mind Your Money* — Available on Apple Podcasts & Spotify



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GROWTH & DEVELOPMENT	Monthly Cost
Online Courses	\$ _____
Professional Development	\$ _____
Other: _____	\$ _____

WEALTH BUILDING (NON-NEGOTIABLE!)	Monthly Cost
Investments/Brokerage	\$ _____
Retirement (401k/IRA)	\$ _____
Savings Goals	\$ _____
Emergency Fund	\$ _____
Other: _____	\$ _____

INSURANCE & PROTECTION	Monthly Cost
Life Insurance	\$ _____
Health Insurance	\$ _____
Disability Insurance	\$ _____
Other Insurance	\$ _____

OTHER EXPENSES	Monthly Cost
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL MONTHLY EXPENSES:	\$ _____
TOTAL ANNUAL EXPENSES (x12):	\$ _____

Now You Have Your Target! Look at your annual total — that's your number. No shame, no guilt. Just clarity. Did you include wealth building? If not, go back and add it. This number isn't impossible. It just requires a plan. Ready to build it? Book your FREE 30-Minute Clarity Call using the QR code above.