

<i>Wealth Cycle Investing Worksheet</i>				
Asset Under Consideration:				
Contact Person(s):				
- Set Up - <i>Getting Your Money And Structures Ready</i>				
Source of Funds (To Be Used To Invest In This Asset)				
Wealth Account	OPM*	Debt/Bank Loan	Restructuring of Other Asset	
*OPM is Other People's Money				
Entities (to use, or structure, for this deal)				
Forecasting (to utilize for this deal)				
- Money Rules - <i>Making Sure The Asset Meets Your Criteria And Objectives</i>				
ROI Goal and Projected				
Cash Flow		Appreciation		
Active		Passive		
Diversification				
Allocation		Risk Reward	Exit Strategy	
- Team -				
Leaders:				
Field Partner:				
Mentor(s):				
Professionals:				
Entity Specialist				
Accountant				
Bookkeeper				
Lawyer				
Utility Players:				
Help at work				
Help at home				
Partners and Colleagues:				
- Due Diligence -				
Data	Discussion	Discovery	Diagnosis	<u>Decision</u>