

Money Pyramid Worksheet

Our Money Pyramid is based on Maslow's Hierarchy of Needs which categorises our needs in a 5-tier pyramid where lower needs must be satisfied before higher needs can be addressed. Similarly, when it comes to finances, it is incomplete to look at numbers without taking into consideration how money will serve your quality of life and sense of emotional well-being. There is a need for an approach that fuses both realms into one conversation, which we call Financial Life Planning. The exercise below, when completed correctly, should produce clarity for you.

Worksheet Steps

1. Read the description for each level on the left & take a moment to think about what it means for you.
2. Complete the amounts on the right for each level. Think about what would be an appropriate amount for you to fulfil each need.
3. Add up the amount from each level and write down the total in the box. This is the amount that you need to live Your Ideal Life.

Your Money Pyramid

