

Congratulations for being among the few who realises the importance and need for undergoing a complete Financial Planning (FP) for yourself and on being just 1 step away of having your own Financial plan ...!

What is Financial Planning (FP)? FP is the process of establishing personal and financial goals and creating a way to reach them. The FP exercise is a must and most recommendable for any person at all times.

We, as professional financial & investment advisors, would like to help you by preparing a complete Financial Plan for you, without any commitments on your side! The Financial Plan that you would receive from us would surely help you a lot knowing more about your goals and the savings needed to achieve them. Please be free while giving in your information to make the financial plan more 'meaningful'.

We thank you for giving us an opportunity to serve you.

Personal Profile:

Sex: Male ☐ Female ☐

Name:

Date of Birth: Occupation:

Marital Status: Married ☐ Single ☐

Contact Details:

Mobile: Tel.No.:(Res.) Off.
(STD Code) (STD Code)

E-mail ID:

Correspondence Address:

All physical communications will be sent to this address

City: Pin Code:

State:

Family Information:

You may ignore the non-dependents in your family here.

Sr. No.	Name	DOB	Age	Relation

Your Financial Goals / Objectives

This is the most important aspect of your Financial Plan as the entire plan would revolve around achieving these goals. If you are not 100% sure about your goals then it is advisable that you approach your Financial Advisor for the same.

Retirement Goal:

Retirement Age Earmarked Investments, If any Rs.
Monthly Income Need* Rs. Expected Returns (%)

* Assuming you are Retiring today, how much monthly cash flow would you need?

Child Future Planning:

		Child 1	Child 2	Child 3
Details	Name of Child			
	Age			
Education Goal	Age			
	Present Cost			
Marriage Goal	Age			
	Present Cost			
Earmarked Investments	For Education Goal			
	Expected Return (%)			
	For Marriage Goal			
	Expected Return (%)			

Other Major Goals

Like Purchase of Home, Automobile, Foreign Tour, Business Capital, etc.

Sr. No.	Name	Years to Maturity	Present Total Cost

Insurance Coverage:

For how many years do you wish to provide financial support to your family members in your absence (From Today)

Total Outstanding Liabilities & Loans

How Much support i.e Rupees per month would be needed ?

Existing Life Insurance Coverage

Existing Health Insurance Coverage

Existing Investments

These are your additional investments that has not been earmarked for any particular Goal.

Please provide a true picture of your existing investments. The Plan would take this in to consideration while calculating the additional savings needed by you.

Product / Instrument	Total outstanding Amount / Value	Expected Returns (%)
Direct Equity		
Mutual Fund Equity		
Mutual Fund Debt		
Bank Deposits / Savings		
Company Deposits		

Product / Instrument	Total outstanding Amount / Value	Expected Returns (%)
Small Savings		
RBI / other Bonds		
Post Recurring Savings		
Property		
Debentures		

Please provide your monthly cash flow estimates. This is very important as it plan would be adjusted to best suit yourself.

Total Income (Post Tax)

Total Expenses

You may also include your spouse's income, if any, in the total income. The expenses are your total monthly household expenses and should also include your payments towards insurance premiums, Loan EMIs, etc in addition to your regular expenses.

How do you see your savings potential growing in the coming years? Please indicate the yearly percentage changes in the saving potential

Till 5 years

(%)

Beyond 5 years

(%)

Date :

Place :

Client's Signature

We thank you for your details and would soon approach you with your own detailed Financial Plan