

# Financial Analysis

## Goal Analysis Report



Prepared for

Mr. Sample

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Prepared By

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## Personal Information

Prepared By Dhan Bazaar FP PVT LTD  
Prepared for Mr. Sample

	Your Details
First Name	Mr. Sample
Birthdate	01-01-1980
Age	34 Years
Marital Status	Single
Occupation	Computer Professional
Address	Sample Sample Sample Mumbai Maharashtra 400001
City	Indore
State	MP
Country	India
Contact No	9999999999
Email	Sample@Sample.com

## Sample Child's Education Planning



Your children will need high levels of training and education to secure employment in a world that is becoming increasingly competitive and technology driven. This page summarizes the education plans for your children and how much you should invest on a monthly basis in order to meet their Education funding needs.

Goal come on Year	Year 2029
Tenure to Achieve this Goal	15 Years from Now
Current Goal Amount	<b>Rs. 1500000</b>
After 15 Years, Goal amount would be	<b>Rs. 4921546</b>
Inflation Assumed for this Goal	8%

## Sample Child's Education Planning Recommendations

This recommendation is developed keeping in mind your risk profile, your goal and time horizon for meeting this goal. This portfolio recommendation is designed using intelligent investment instrument selection and diversification to protect you from taking more than your desired level of risk.

Goal Achievement through Monthly Savings	<b>Rs. 9865</b>
Goal Achievement through Lumpsum Investment	<b>Rs. 835349</b>

\* Expected Rate of Return for SIP & Lumpsum Investment is - 12 %

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### Disclaimer

- Dhan Bazaar FP PVT LTD has no control over the accuracy of the information provided by clients.
- Dhan Bazaar FP PVT LTD does NOT guarantee the results for your plan, the calculation is as per the data provided by client & necessary assumptions.
- Estimates of income and growth in the plan will be based on assessments of prevailing economic conditions and investment manager performance. However no guarantee of future performance will be given and results may vary from the estimates shown. The figures in the plan include various estimates with respect to taxation and other laws which we believe to be relevant. This service agreement is not enforceable by law and is a document of trust and faith.

### Purpose and Nature of this Report

This confidential report has been developed to provide you background information on issues you may want to discuss further as part of your personal financial planning. You may be familiar with some of these subjects. Others may be new to you and may present aspects that you have not yet considered. This financial plan is a general plan based on information you supplied. Where we had no information from you, we made a few general assumptions which may not be suitable for you depending on your own specific needs and circumstances. The usefulness of this analysis will depend on the accuracy and completeness of that information. The results provide:

- An overall view of your present financial position.
- An analysis of your family's future financial needs.
- An examination of the impact of time and potential inflation.
- An evaluation of your goals to see if they are practical and achievable.
- Possible adjustments or changes to help achieve your goals.

This financial analysis will show you how much money you need to save and invest, the rate of return needed to reach your goals, and how much insurance you need, if any. It will also show you how to carry out your course of action. Setting goals, planning, implementing and monitoring, results in a complete program. During the plan delivery session, you may discuss more facts and circumstances relevant to your family's finances that may alter the recommendations made here. I

can work with you to tailor this report to your changing situation by making the necessary adjustments. The overall results you achieve when you carry out some or all of the recommendations contained in this plan. Changes that occur in your financial circumstances as well as in the economy can affect this plan. Information about market values reflects values on the date provided by you. It is important that you keep track of your progress and make changes as needs arise; therefore we recommend annual updates. As with any plan, the final responsibility for any action you take rests with you.

## **Important**

The projections or other information made by Plan Builder about the likelihood of various investment outcomes are hypothetical in nature, and do not reflect actual investment results and are not guarantees of future results.

## **Privacy**

We treat the information gathered during the planning process as strictly confidential and will use any such information only for business purposes you have with me. The information obtained will not be disclosed to any unaffiliated third-party except if such information is required by law or regulatory process or authorized by you in writing