





**Child Future Planning:**

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

**Other Major Goals**

e.g 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