



Name: XYZ Name
Email: monu@yopmail.com
Invoice Date: 09-04-2024
Required Return: 100 out of 100

Retirement Score 40
Remarks Serious attention is required

Required Return	18.57%
Portfolio Style as Per Required Return	Super Aggressive

Asset Allocation Report:

Pools	Pool Amount (Rs)	% Allocation
Immediate + Emergency Pool (0-2 years)	₹ 600,000.0	12.00%
Stable Pool (2-7 Years)	₹ 21,306,696.3	426.13%
Venture Pool (7+ Years)	- ₹ 16,906,696.3	338.13%
	₹ 5,000,000.0	100.00%

Section A1: General Questions

Todays Date: 9-Apr-24
Family Head Name: Mr Singh
DOB: 21 Apr 1977
Age: 47





Section A2: Income Related Questions

Current Monthly Income	₹ 200,000.00
Other Sources of Income (Rent):	₹ 50,000.00
Current Monthly Exp (incl EMI):	₹ 100,000.00

Section A3: Retirement Related Questions

Retirement Age (In years):	56 At what age do you want to Retire?
Expected Monthly Expenses Post Retirement (Rs)	₹ 100,000.00 As per today value

Section A4: Future Large Expenses

Life Milestones	Value as per today (Rs)	Time period (in yrs)
Emergency Fund	₹ 600,000.00	0
Future Expenses 1	₹ 3,000,000.00	2
Future Expenses 2	₹ 3,000,000.00	5
Future Expenses 3	₹ 2,500,000.00	6
Future Expenses 4	₹ 2,500,000.00	10
Future Expenses 5	₹ 10,000,000.00	3

Section A5: Existing Assets

Name	Current Value
Cash and Cash Equivalents (liquid)	₹ 0.00
Business (If your are a Business Owner)	₹ 0.00
Stocks	₹ 0.00





Section A5: Existing Assets

Name	Current Value
Mutual funds	₹ 0.00
FDs and Bonds	₹ 0.00
PPF	₹ 5,000,000.00
Other Govt schemes	₹ 0.00
Market linked insurance	₹ 0.00
Advance and receivables	₹ 0.00
Gold (Except jewellery)	₹ 0.00
Real estate (Eligible For Rental Yield)	₹ 0.00
Other Asset	₹ 0.00
	₹ 5,000,000.00

Section A7: Golden Figure

Amount of corpus you want to transfer to next generation	₹ 50,000,000.00
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Year	Corpus Amount at the start of the year	Yearly Income	Year Expenses	Major Expenses	FV of wealth transfer corpus	Corpus Amount at the end of the year
2024	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00
2025	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00
2026	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00
2027	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00
2028	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00





Year	Corpus Amount at the start of the year	Yearly Income	Year Expenses	MajorExpenses	FV of wealth transfer corpus	CorpusAmount at theend of the year
2029	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00
2030	₹ 5000000	₹ 24,600,000.00	₹ 12,000,000.00	₹ 6,000,000.00	₹ 0.00	₹ 11,600,000.00

