

Goals Template

	Client	Spouse
Name		
Age		
Married or single?		
Taxpayer in UK or Scotland?		
Employed, Self Employed?		
Salary/Profits	£	£
Interest	£	£
Dividend rec'd	£	£
Total outgoings	£	

Goals	Reason	Amount	Present Value or Future Value	Rate of increase	Age at first payment	Age at last payment
1		£	PV / FV	%		
2		£	PV / FV	%		
3		£	PV / FV	%		
4		£	PV / FV	%		
5		£	PV / FV	%		

Money available	Reason	Amount	Present Value or Future Value	Rate of increase	Age at first payment	Age at last payment
Source 1		£	PV / FV	%		
Source 2		£	PV / FV	%		
Source 3		£	PV / FV	%		
Source 4		£	PV / FV	%		
Source 5		£	PV / FV	%		
Source 6		£	PV / FV	%		

Net growth rate	%
Inflation rate	%
Show inflation adjusted figures?	No / Yes

Additional single contribution available	£
--	---