

Education Template

Details	
Clients name	
Number of children	1 / 2 / 3

Child 1 Date of Birth (dd/mm/yyyy)	__ / __ / __
Child 2 Date of Birth (dd/mm/yyyy)	__ / __ / __
Child 3 Date of Birth (dd/mm/yyyy)	__ / __ / __

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

Lump sum available, AND / OR	£
Regular contribution per annum	£

	Primary		Secondary		University		House Deposit
Fund for fees?	Yes/No		Yes/No		Yes/No		Yes/No
Age @ start							
Age when finish			18				
Fees p.a. (in today's value)	£		£		£		
Plus one off cost when start	£		£		£		£
Increasing by	%		%		%		%