

### Goals Template

|                             | Client | Spouse |
|-----------------------------|--------|--------|
| Name                        |        |        |
| Age                         |        |        |
| Married or single?          |        |        |
| Taxpayer in UK or Scotland? |        |        |
| Employed or Self Employed?  |        |        |
| Salary/Profits              | £      | £      |
| Property Income             | £      | £      |
| Gross 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 | £ |
|------------------------------------------|---|