

FP ☰ 👤 a a

**Risk profiler** 🏠 Home > Profiling > Risk profile

Please select from below, the type of risk profiling you want to carry out?

Concise Risk profiler ⓘ
  Detailed Risk profiler ⓘ

**Detailed Risk profiler**

1

2 **When you think of the word "risk" which of the following words comes to mind first?**

I am afraid I would end up making losses.

I am not sure what would be the outcome of the risk and the uncertainty makes me uncomfortable.

I feel there is an opportunity for making some gains.

I am thrilled by it and look forward to it

3

4

5

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[Assets](#)
[Financial Liabilities](#)
[Cash Inflows](#)
[Cash Outflows](#)

**Financial Assets** Data as on date \*: 08/10/2017 📅 ↻

Amount	Approx rate of return	Consider ?	Consider %	Liquidate ?	Liquidate %
Enter Amount	Enter Rate of return	Yes ▾	Enter Rate of return	Yes ▾	Enter Rate of return
<input type="button" value="+ Add Asset-wise details"/>					
Fixed Income					
Retirement Funds					
Insurance Funds					
Liquid assets					
Alternate assets					
Lifestyle assets					
Windfall assets					

FP ☰ Home > Profiling > Financial Goals

## Financial Goals

Goal Categories Selection

Select goals category

Goals Creation

Goals Summary

FP ☰ Home > Profiling > Life Cover needs

## Life Cover needs Pooja Thorat

Percent of lifestyle expense to be made available to family after demise: 5

Expected Rate of return on annuity: 10

For How many years?

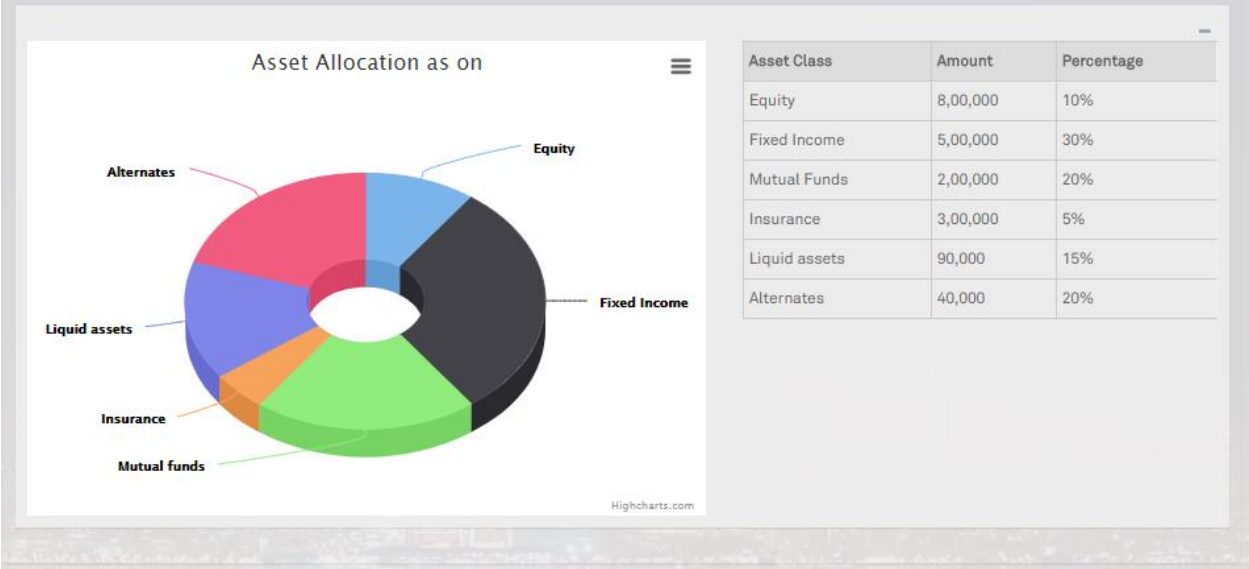
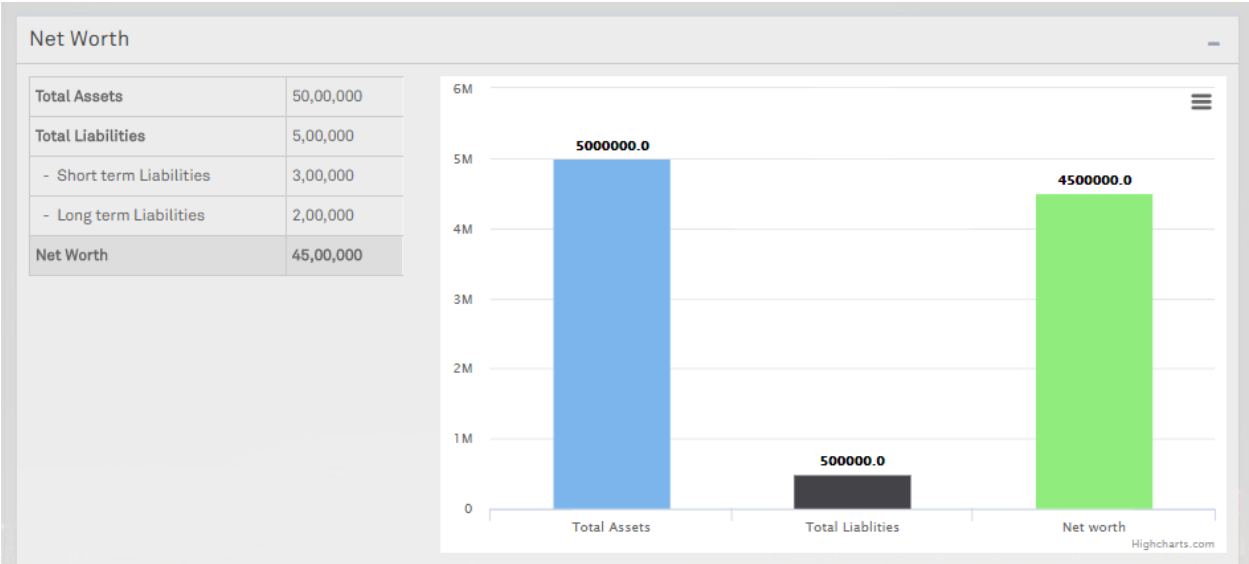
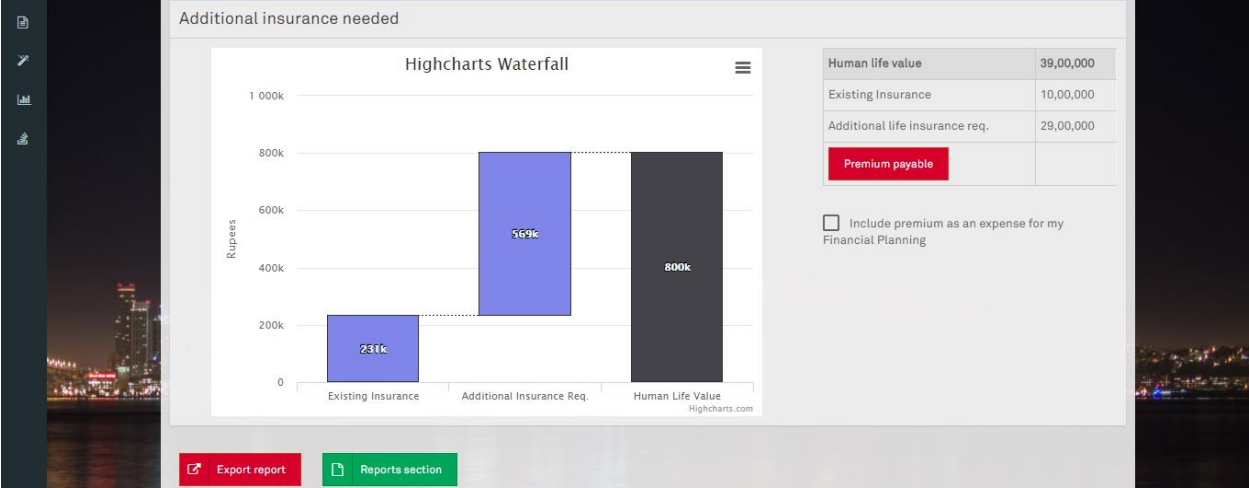
- 12** Till my retirement age
- 40** Till my last goal is achieved
- 37** Till all my goals except retirement is achieved
- 34** Till youngest child is 25
- Any other

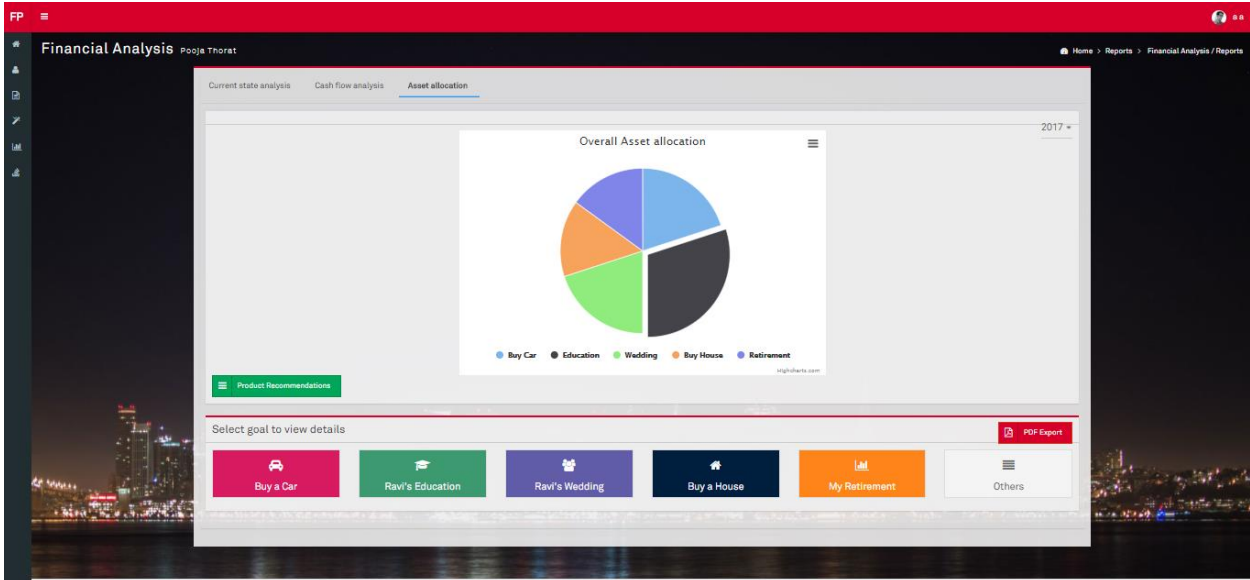
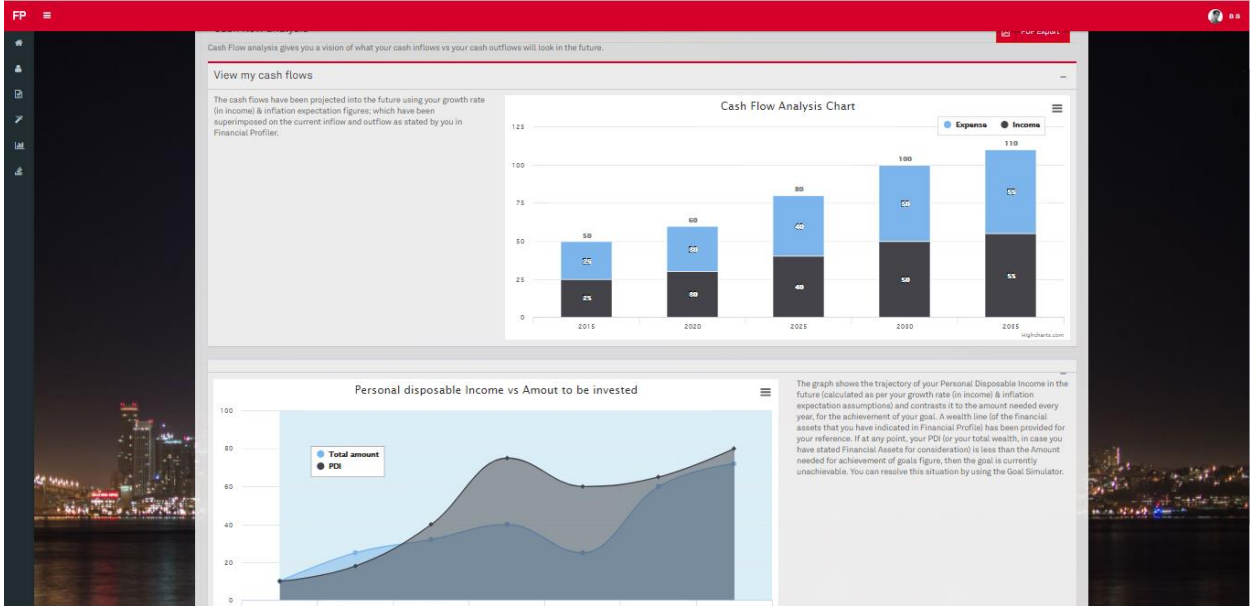
Which goals would you like to protect with insurance?

- To Buy a Car (Lifestyle Asset)
- Ravi's Education (Education Asset)
- Wedding Asset (Ravi's Wedding)
- To Buy a Car (Buy a House)
- My Retirement (Retirement Asset)

Existing Insurance cover: 10,00,000

Save and calculate additional life cover



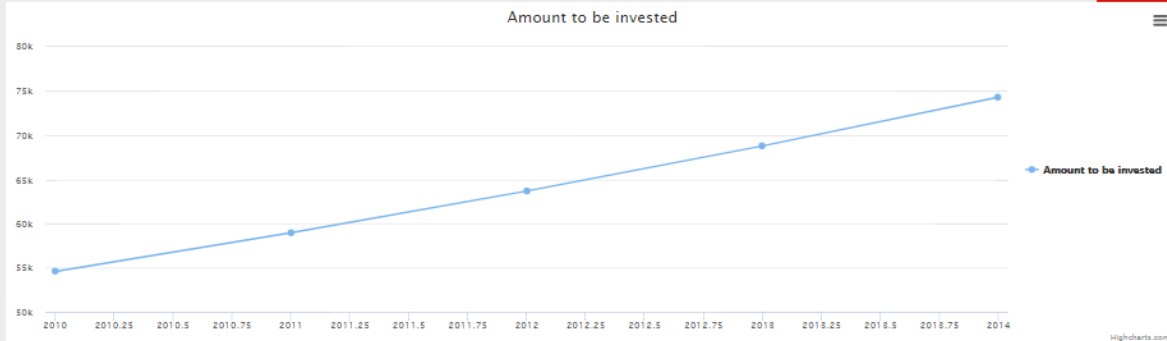


## Amount to be invested

The amount to be invested for the achievement of your goals has been calculated according to the future value of your goal as required at goal maturity. It takes into account, your risk appetite and the assets allocation that is optimal to your profile.

The amount to be invested is in the form of a systematic investment plan where you can invest money every year or month, and thus start earning returns that will go towards the achievement of your goals.

[View Data](#)



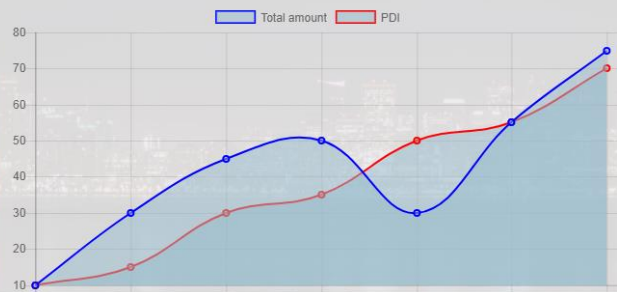
- Buy a Baleno +
- Buy a Home +
- Education - Ravi +
- Marriage - Ravi +
- Retirement +

### Liquid Asset distribution



Car Education Wedding Retirement Home

### Projected Disposable income Vs. Amount needed for goal achievement



### Comfort Zone





Goal Amount	Tenure	Future Value	Amount to I		
8,00,000	2 Yrs	9,70,000	3,80,000		

Select Product	Serial Number	Recommended Products - Equity	View Product details	Allocation % - 10%	Allocation amount
<input type="checkbox"/>	0001	ABC Focused Bluechip Equity Fund	<a href="#">Details</a>	<input type="text" value="10%"/>	38,000
<input type="checkbox"/>	0002	BAC Infrastructure Fund	<a href="#">Details</a>	<input type="text" value="0%"/>	0

Select Product	Serial Number	Recommended Products - Debt	View Product details	Allocation % - 70%	Allocation amount
<input type="checkbox"/>	0001	ABC Banking & PSU Debt (G)	<a href="#">Details</a>	<input type="text" value="30%"/>	1,33,000
<input type="checkbox"/>	0002	BAC Dynamic Accrual Plan (G)	<a href="#">Details</a>	<input type="text" value="30%"/>	1,33,000

Select Product	Serial Number	Recommended Products - Gilt	View Product details	Allocation % - 10%	Allocation amount
<input type="checkbox"/>	0001	XYZ Constant Mat Gilt- DP (G)	<a href="#">Details</a>	<input type="text" value="10%"/>	38,000

Select Product	Serial Number	Recommended Products - Gold	View Product details	Allocation % - 10%	Allocation amount
<input type="checkbox"/>	0001	Gold Direct	<a href="#">Details</a>	<input type="text" value="10%"/>	38,000
<input type="checkbox"/>	0002	Gold Paper	<a href="#">Details</a>	<input type="text" value="0%"/>	0

FP Vishal Ahuja

## Life Cover Recommendation Pooja Thorat

Home > Recommendations > Life Cover Recommendation

Term	Covered by Life Insurance till age	Surr	
30 Yrs	1,00,00,000	1,00	

Serial Number	Recommended Products	View Product detail
0001	ABC Life Raksha Term Insurance Plan	<a href="#">Details</a>
0002	ABC iCare II Term Insurance Plan	<a href="#">Details</a>
0003	ABC iProtect Smart Life Cover Plan	<a href="#">Details</a>

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