

GOLFIN REPORT

PERSONAL PROFILE

Name: Anish Bhaskar

Age: 29

Gender: Male

Email ID:

Mobile Number:

Location: Bangalore

Goals given:

1. Children's Education
2. Dream Vacation

BUDGET PROFILE

Income (Take Home): Rs. 65,000

Expenses: Rs. 20,000

EMI's: Rs. 25,000

Savings: Rs. 20,000

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CHILDREN'S EDUCATION

Number of Children: 1

Age of Children: 4

Child 1:

Field of Study: Science/Arts/Commerce

Degree/ Course: Bachelor's

Country: US/India/UK

Amount required now: Rs. 25,00,000

Amount required in 2032: Rs. XX,XX,XXX

Term: 14 years (Long Term Goal)

Periodicity/Return	Conservative A%	Moderate B%	Aggressive C%
Monthly	XX,XXX	XX,XXX	XX,XXX
Quarterly	XX,XXX	XX,XXX	XX,XXX
Half Yearly	XXX,XXX	XXX,XXX	XX,XXX
Yearly	XXX,XXX	XXX,XXX	XXX,XXX
One-Time	XXX,XXX	XXX,XXX	XXX,XXX

Assumptions:

Inflation Rate: X%

Bank interest rates for partial loans: X%

Considering self funding/self funding plus bank loan: X:Y ratio

Foreign exchange rate: Rs XX

Cost of living index in that country: XXX

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DREAM VACATION

No of people: 3

Destination: Macau-Singapore-Malaysia/Bali-Indonesia/Europe

Planned Year: 2021

Amount required now : Rs. 5,00,000

Amount required in 2021: Rs. X,XX,XXX

Term: 3 years (Medium term goal)

Periodicity/Return	Conservative A%	Moderate B%	Aggressive C%
Monthly	XX,XXX	XX,XXX	XX,XXX
Quarterly	XX,XXX	XX,XXX	XX,XXX
Half Yearly	XXX,XXX	XXX,XXX	XX,XXX
Yearly	XXX,XXX	XXX,XXX	XXX,XXX
One-Time	XXX,XXX	XXX,XXX	XXX,XXX

Global tourism inflation : X%

Currency changes factored into inflation

Rise in flight prices, food and beverages and other tourist passes