

Goal Settings Data-Sheet

Sr. No.	Goal	Goal Year	No of years left	Expected Funds from Present Savings	Inflated amt	Short fall in amt. if any

(Amts. are in Rs.)

Monthly Expenditure in Rs.

a. Essential Exp.

b. Other Exp.

Total Exp.

Total Monthly Income in Rs.

a. Income from Salary/Business.

B. Other income, if any.

Total Monthly income.

Disposable Monthly income.

Present Savings/Investment pattern and cash flow.

Present Investments	Appx MLY/YLY contribution	Expected Amt at Maturity	Maturity Dates	Age at Maturity		
				Yours	Spouse	Children
National Savings Certificate						
Kisan Vikas Patra						
Postal MIP						
SIP in Mutual Funds						
Single Inv in Mutual Funds						
Public Provident Fund						
National Pension Scheme						
Any other Investments						
Life Ins policies						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10.						