

SideQuest

Ready to retire?



HOLD YOUR



We need some information to measure
your financial health!

Phone Number, Username or Email

Take Survey

Survey takes approximately 5 minutes

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What is your name?

What is your age?

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Do you have any existing bank loan? (If yes, what is the remaining value)

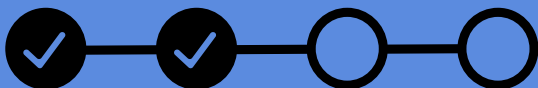
Do you have overdue balance on your credit card? If yes, how much?

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What is your total assets worth? (E.g Houses, Jewellery, Car, etc.)

How much do you need to pay monthly on your debts?

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**What is your monthly
gross income?**

**What is the total value of
your invested assets?**

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**What are you current
investments allocation? If
any (e.g. 50% stocks 50%
bonds)**

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What is your risk
appetite?



High risk = high reward

**Neutral risk > More
Diversed**

Low risk = Low reward

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**How much is in your
savings account?**

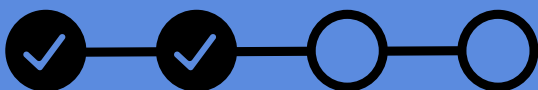
**How much do you put into
your savings account
monthly?**

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What is your monthly
expenses?

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Evaluation

Targets met



Liquidity

0/2



Savings

0/1



Debt

0/2



Investment

0/1



Solvency

0/1

Liquidity

Basic Liquidity Ratio: **1 month**

Recommendation:

- 1) Set aside more cash
- 2) Lower expenses

Why?

Liquid Assets to Net Worth Ratio: **20%**
Requirements Met

This means that you have sufficient cash in times of need.

Why?

Liquidity

Basic Liquidity Ratio

1 month

Recommendation:

This means that you only have sufficient savings for one month of expenses without income. Hence you should set aside more cash of at least (insert math thingy)

Liquid Assets to Net Worth Ratio

20%

Requirements Met

This means that you have sufficient cash in times of need.

