

soa_id=201

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1	Statement of Advice
1	Licensee ID: ADV_5
1	Client ID: C_1
1	Client age segment: 2
2	Analysis of current financial position
2	Total assets: 222000
2	Total liabilities: 180000
2	Annual income: 210000
2	Annual expenses: 140000
3	Analysis of risk profile
3	What proportion of your assets are you willing to lose in 1 year? 0.3
4	Financial objectives
4	What annual income would you like your assets to produce? 20000
4	What is the amount you want to have at retirement? 4200000
4	What is the amount you would like to have at retirement? 8400000
5	Financial advice - Investment Strategy
5	Target allocation in cash: 60% to 80%
5	Target allocation in Australia equities: 20% to 30%
5	Target allocation in international equities: 0% to 10%