

FILTERS

Clients

Search

- ☐ Anna Müller
- ☐ David Schmidt
- ☐ Jonas Fischer
- ☐ Katrin Neumann
- ☐ Laura Becker
- ☐ Michael Wagner
- ☐ Sophie Keller



Finance - Dashboard



7

Total Clients

84K

Net Worth (€)

18K

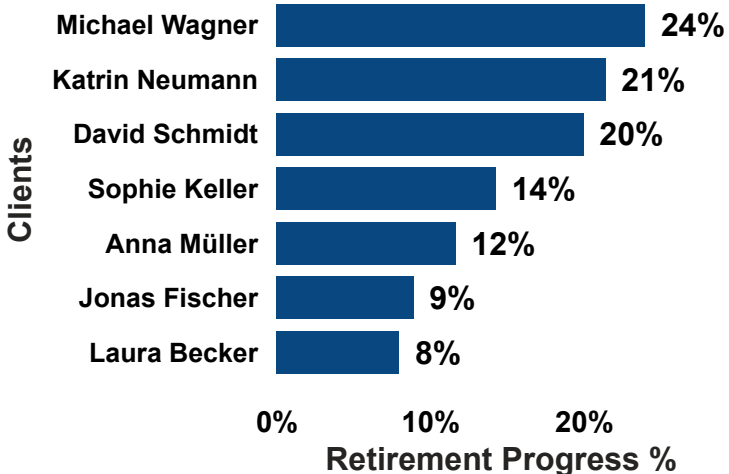
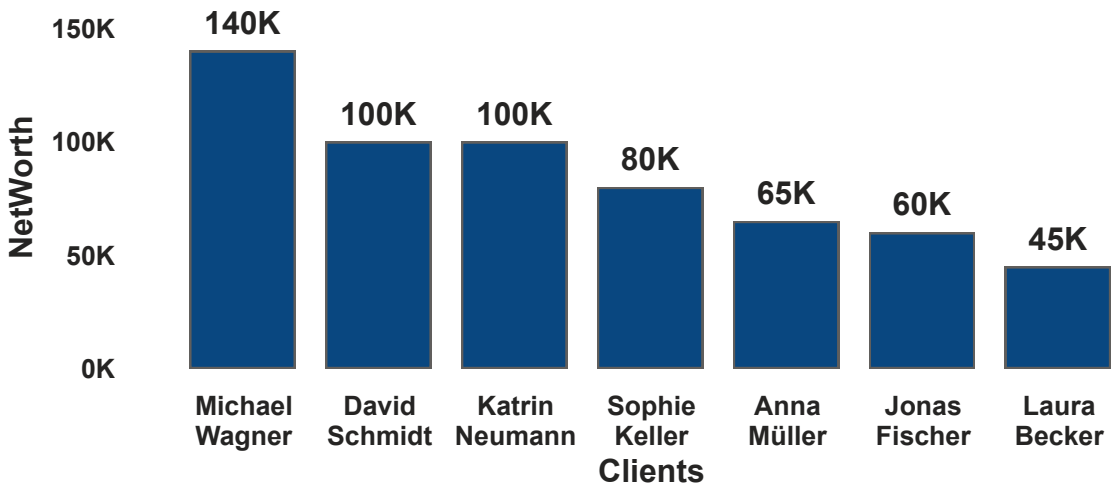
Coverage Gap (€)

29

Age

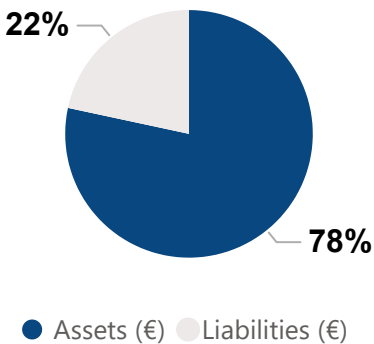
15%

Retirement Progress %



Clients	Monthly Income (€)	Monthly Expenses (€)	Retirement Goal (€)	Savings Rate (%)
Anna Müller	4,200 €	2,500 €	3,00,000 €	20
David Schmidt	5,500 €	3,200 €	4,00,000 €	25
Jonas Fischer	3,900 €	2,300 €	2,80,000 €	20
Katrin Neumann	5,300 €	3,100 €	4,20,000 €	24
Laura Becker	3,600 €	2,200 €	2,50,000 €	18
Michael Wagner	6,200 €	4,000 €	5,00,000 €	22
Sophie Keller	4,800 €	2,700 €	3,50,000 €	21

Assets (€) and Liabilities (€)



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Clients

Laura Becker

Predictions



2.60

Projected Progress %

Yes

Target Achievement

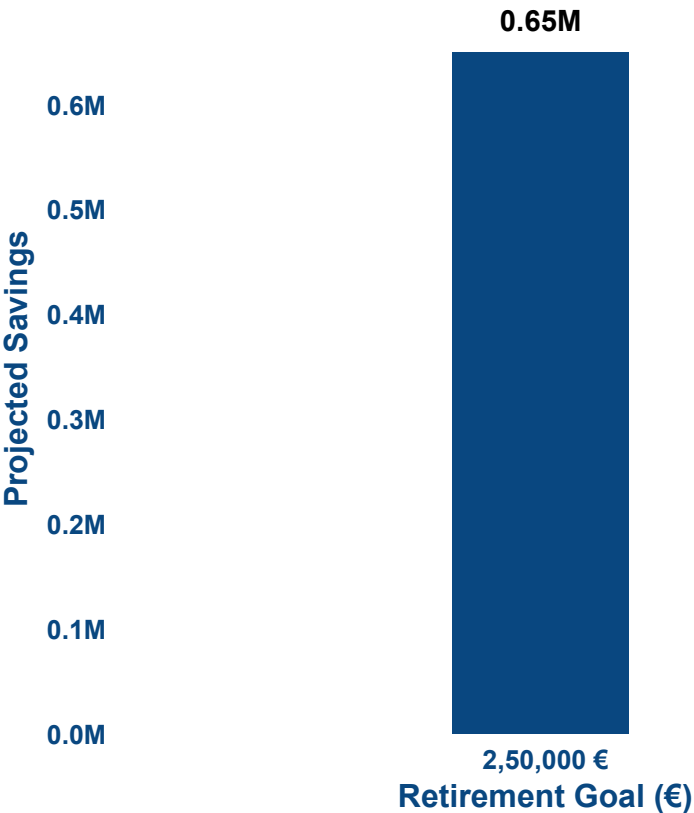
5.01

Required Savings Rate (%)

1

Target Achievement KPI

Projected Savings by Retirement Goal (€)



Projected Savings by Client Name

