# Current Position

|  |  |
| --- | --- |
| **Income** | **Amount** |
| **Taxable Income** | {{ currency(taxable\_income,0) }} |
| **Expenses** | **Amount** |
| **Cost of Living** | {{ currency(col,0) }} |
| **Tay Payable** | {{ currency(tax\_payable,0) }} |
| **Net Cashflow** | **{{currency(net\_cashflow,0) }}** |

# What you want to achieve

You have described yourself as {{goal\_cat}}.

A recommended set of goals to talk about for a {{goal\_cat}} client includes:

{%p if goal\_cat == ‘Young to mid-life’%}

* buying your first home
* travelling
* paying off education debts (TAFE, HECS, HELP, etc.)
* getting married
* having children
* family healthcare
* business planning

{%p elif goal\_cat == ‘Mid-life’%}

* healthcare
* investments
* financing and home renovations
* tax management
* debt management
* inheritances
* retirement planning
* long term care planning
* income protection

{%p elif goal\_cat == ‘Pre-retirement’%}

* debt elimination
* family healthcare
* helping your children
* retirement planning
* wills and trusts
* business exit strategies

{%p elif goal\_cat == ‘Retirement’%}

* protecting your assets
* healthcare
* aged care planning
* travelling
* buying a caravan
* inheritance tax migration
* gifting to family
* preserving your capital
* estate planning

{%p endif %}