AAI!

FINANCIAL

# suitability report

[NAME]

www.advisoryai.com

# overall...



[RETIREMENT\_INFO]

your objectives

### **[DETAILS]**

1.

[NUMBER]

[VALUE] [NOTES]

### **[DETAILS]**

2.

[VALUE][NOTES] [PERCENTAGE]

### **[RETIREMENT\_INFO]**

3.

[VALUE][RETIREMENT\_INFO]

[AMOUNT]

aai! [www.advisoryai.com](http://www.yipfinancial.co/)

your income...

your expenses...

**[VALUE][NUMBER][VALUE]**

**[INFO]**

**[VALUE][NUMBER][VALUE]**

**[INFO]**

what this is made up of: what this is made up of:

1. [NUMBER]
2. [NUMBER]
3. [NUMBER]
4. [NUMBER]
5. [NUMBER]

[NAME][VALUE][NUMBER][VALUE]

[NUMBER]

your money...

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Plan | Owner | Value | Contributions | Withdrawals | Performance (%) |
| [DETAILS] | [NAME] | [VALUE][NUMBER][NUMBER] | [VALUE][VALUE][NUMBER][NUMBER][INFO] | [AMOUNT] | [PERCENTAGE] |
| [INFO] | [NAME] | [AMOUNT][NUMBER][NUMBER] | [AMOUNT] | [AMOUNT] | [PERCENTAGE] |
| [DETAILS] | [NAME] | [VALUE][NUMBER][NUMBER] | [VALUE] | [AMOUNT] | [PERCENTAGE] |
| [NAME] | [NAME] | [AMOUNT] | [AMOUNT] | [AMOUNT] | [PERCENTAGE] |
| [INFO] | [NAME] | [AMOUNT] | [AMOUNT] | [AMOUNT] | [PERCENTAGE] |
| [INFO] | [NAME] | [AMOUNT] | [VALUE] | [AMOUNT] | [PERCENTAGE] |

your assets...

Stocks & Shares ISA

[NUMBER]

A green house on a black background

Description automatically generated

**investments:**

[VALUE][AGE][NUMBER]

**property:**

[VALUE][AGE][NUMBER]

**pensions:**

[VALUE][NUMBER][NUMBER]

**cash:**

[VALUE][AGE][VALUE]

**other:**

[DETAILS]

your liabilities...

* [NUMBER]
* [NUMBER]



**your statement of purpose...**