

John Doe

Occupation:

Software Engineer

Emergency Fund:

\$20000

Financial Goal:

Buy a house

Contact:

Phone Number: 123-456-7890

Stocks:

\$50000

Target Amount:

\$500000

Plan 1

Investment Allocation:

Stocks: 30%

Mutual Funds: 40%

Fixed Deposits: 20%

Bonds: 10%

Monthly Contribution:

Required: \$4167

Current: \$1400

Shortfall: \$2767

Recommended Steps:

- Increase monthly contributions towards investments.
- Rebalance portfolio to align with moderate risk profile.
- Establish an emergency fund of \$18,000.
- Explore additional insurance options.

Total Returns:

\$283830.27

Plan 2

Investment Allocation:

Stocks: 40%

Mutual Funds: 30%

Fixed Deposits: 20%

Bonds: 10%

Monthly Contribution:

Required: \$4167

Current: \$1600

Shortfall: \$2567

Recommended Steps:

- Increase monthly contributions towards investments.
- Rebalance portfolio to align with moderate risk profile.
- Establish an emergency fund of \$18,000.
- Review insurance options.

Total Returns:

\$295500.00