00AAI!

FINANCIAL

# suitability report

[AI Generated Content for: Sarah]

www.advisoryai.com

# 04172868overall...



[AI Generated Content for: Your diverse income streams provide a solid financial foundation, with your primary concerns being business expansion and real estate investments. Key focus areas include growing your business, optimizing investment returns, and planning for early retirement.]

your objectives

Increase annual business revenue to £500,000 within the next

[AI Generated Content for: 3 years through strategic growth initiatives.]

[AI Generated Content for: Achieve a balanced investment portfolio with a target annual return of 8% across various asset classes.]

[AI Generated Content for: Build a retirement fund sufficient to support an annual income of ]

[AI Generated Content for: £60,000 by age 55.]

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

your income...

your expenses...

£220,000per annum£220,000per annum£8,500per month£8,500per month

**[AI Generated Content for: £220,000]**

**[AI Generated Content for: per annum]**

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

3806190213360Business Reinvestment: £3,000/monthMortgage Payments: £2,500/monthTravel and Entertainment: £1,000/monthInvestment Contributions: £1,000/monthHousehold Expenses: £1,000/month00Business Reinvestment: £3,000/monthMortgage Payments: £2,500/monthTravel and Entertainment: £1,000/monthInvestment Contributions: £1,000/monthHousehold Expenses: £1,000/month713491211801Business: £150,000Investments: £70,000Business: £150,000Investments: £70,000

1. [AI Generated Content for: Business Reinvestment: £3,000/month]
2. [AI Generated Content for: Mortgage Payments: £2,500/month]
3. [AI Generated Content for: Travel and Entertainment: £1,000/month]
4. [AI Generated Content for: Investment Contributions: £1,000/month]
5. [AI Generated Content for: Household Expenses: £1,000/month]

your money...

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Plan | Owner | Value | Contributions | Withdrawals | Performance (%) |
| [AI\_CALC: 165] | [AI\_CALC: 858] | [AI\_CALC: 756] | [AI\_CALC: 700] | [AI\_CALC: 296] | [AI\_CALC: 820] |
| [AI\_CALC: 632] | [AI\_CALC: 505] | [AI\_CALC: 765] | [AI\_CALC: 237] | [AI\_CALC: 505] | [AI\_CALC: 198] |
| [AI\_CALC: 108] | [AI\_CALC: 391] | [AI\_CALC: 587] | [AI\_CALC: 667] | [AI\_CALC: 298] | [AI\_CALC: 229] |
| [AI\_CALC: 462] | [AI\_CALC: 332] | [AI\_CALC: 345] | [AI\_CALC: 789] | [AI\_CALC: 407] | [AI\_CALC: 972] |
| [AI\_CALC: 706] | [AI\_CALC: 900] | [AI\_CALC: 457] | [AI\_CALC: 910] | [AI\_CALC: 952] | [AI\_CALC: 458] |
| [AI\_CALC: 678] | [AI\_CALC: 896] | [AI\_CALC: 670] | [AI\_CALC: 257] | [AI\_CALC: 445] | [AI\_CALC: 147] |

00your assets...Stocks & Shares ISAyour assets...Stocks & Shares ISA33836767302703Expand business operations, diversify investments for optimal returns, and secure early retirement with £60,000 annual income by age 55.Expand business operations, diversify investments for optimal returns, and secure early retirement with £60,000 annual income by age 55.

your assets...

Stocks & Shares ISA

3688715722630investments:£320,0000investments:£320,0001198245719455property:£200,0000property:£200,0002470150721995pensions:£150,0000pensions:£150,0005285740730250cash:£30,0000cash:£30,00013430259588500263461595885003975735908050052987669696600

**investments:**

[AI Generated Content for: £320,000]

795232456776other:0other:19765432950422Other details of assets00Other details of assets

**other:**

your liabilities...

* [AI Generated Content for: Mortgage: £450,000 remaining]
* [AI Generated Content for: Business Loan: £100,000 outstanding]



**your statement of purpose...**