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: 684] | [AI\_CALC: 163] | [AI\_CALC: 865] | [AI\_CALC: 815] | [AI\_CALC: 752] | [AI\_CALC: 235] |
| [AI\_CALC: 332] | [AI\_CALC: 251] | [AI\_CALC: 400] | [AI\_CALC: 522] | [AI\_CALC: 158] | [AI\_CALC: 339] |
| [AI\_CALC: 574] | [AI\_CALC: 582] | [AI\_CALC: 728] | [AI\_CALC: 495] | [AI\_CALC: 808] | [AI\_CALC: 849] |
| [AI\_CALC: 643] | [AI\_CALC: 386] | [AI\_CALC: 962] | [AI\_CALC: 477] | [AI\_CALC: 372] | [AI\_CALC: 377] |
| [AI\_CALC: 847] | [AI\_CALC: 443] | [AI\_CALC: 582] | [AI\_CALC: 728] | [AI\_CALC: 511] | [AI\_CALC: 564] |
| [AI\_CALC: 651] | [AI\_CALC: 992] | [AI\_CALC: 875] | [AI\_CALC: 157] | [AI\_CALC: 346] | [AI\_CALC: 499] |

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...**