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## Financial Health Report

**Hi vipin kumar yadav!**

Thank you for planning your family's financial future with us.

### Benefits of Financial Planning



**Achieve Goals  
in Time**



**Prepare for  
Emergencies**



**Increase Tax  
Savings**



**Optimize your  
Resources**



**Improved  
Living Standard**

Created by

**test | 6999912345**

Disclaimer: The above is prepared for internal consumption only and is used for assisting the potential and interested customers only on a need-to-know basis. All prospects to note that the same is being shared post discussion with our Company and/or our Authorised Sales Person (BQP/POSP) and purely shared on your request based on the data provided by you.



## Hi vipin kumar yadav,

We appreciate you doing your financial planning with us.  
Thank you for trusting us with your personal details.

Below are some details you had shared with us

Name	Date of Birth
<b>vipin kumar yadav</b>	<b>01 April 2000</b>
Phone no.	Life Stage
<b>9876543210</b>	<b>Married with kids</b>

Family Members - 7  
6 dependants



Self, Mother, Father, Wife, 2  
Daughters & Son

## Monthly Family Cash Flow Details

As per details of Apr 2023



Monthly Income  
**₹ 4,80,000**



Monthly Expenses  
**₹ 2,50,000**

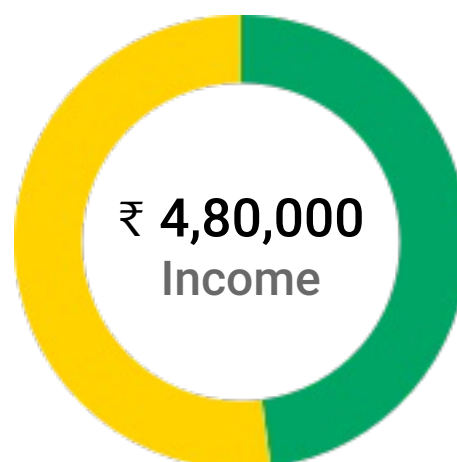


Monthly Savings  
**₹ 2,30,000**

### Savings Ratio

**48%**

Ideal savings ratio of a person in your life stage is 52%



● Expenses 52% ● Saving 48%

Disclaimer: The illustrations and calculations are for demonstration purposes only based on inputs provided by you.



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Guarantee

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Support

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## Financial Readiness Check

The primary objective of this was to assess your current financial status and your financial preparedness to face various challenging life situations.

You are **Well Prepared** for

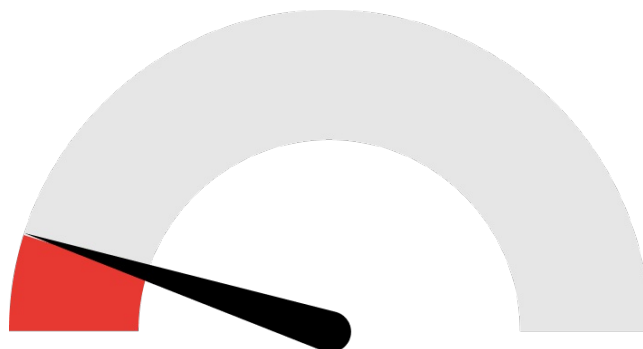
- ✓ Securing Family's future

You **Need to Prepare** for

- ✗ Major illness coverage
- ✗ Hospitalization of a family member
- ✗ Income in your retired life
- ✗ Loss of Job/Income
- ✗ Guidance from Financial expert
- ✗ Physical disability
- ✗ Children's higher education
- ✗ Repayment of loans & liabilities
- ✗ Mortgage payment

Your score is :

1/10



### Very Low

You don't seem to be financially ready for your future! It's time to plan better to avoid financial burden on you and your loved ones.

### Observations



Emergency Fund  
Level



Low



Insurance Fund  
Level



Low



Future Needs  
Fund Level



Low

- Emergencies come with no hints. An emergency fund can be created of at least money amounting to at least a salary of 6 months
- Having adequate insurance gives you peace of mind and provides you financial security along with tax savings, wealth creation and investment avenues.
- Prioritizing your investments and expenditures can help you with having a better life in the future. It is important to understand how much money is being saved and how to save it better.

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## Life's Financial Goals

We all have many aspirations & goals to achieve. Prioritising, planning and focused action help us achieve them



### Plan for achieving any of following goals

#### PLANNING PENDING



#### Child's Higher Education

Help your children meet their career goals with the right financial plan

#### PLANNING PENDING



#### Wealth Creation

Make way for priceless surprises like diamond jewellery or home renovation

#### PLANNING DONE



#### Secure Family's Future

Let your family have a financial support system even in your absence



#### Retirement Planning

Ensure your golden years are filled with happiness and good health



#### Child's Marriage

Enjoy your child's wedding without the burden of any financial worries



#### Buy Dream Car

Get ready for many happy journeys in your dream car



#### Buy Dream House

Find the keys to your own home with the right plan



#### Travel Abroad

Create memories with your family at dream destinations around the world



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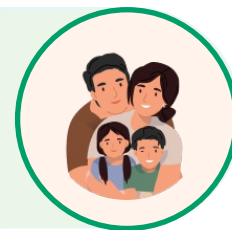
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## Secure Family's Future

Let your family have a financial support system even in your absence



### Below are the details shared by you

You wish to retire in

56 Years

Percentage of my expenses you wish to secure till you retire

38 %

Percentage of my expenses you wish to secure after you retire

51 %

After retirement you wish to secure my family needs for

19 Years

You have taken a loan of

₹ NaN

You have a life insurance cover of

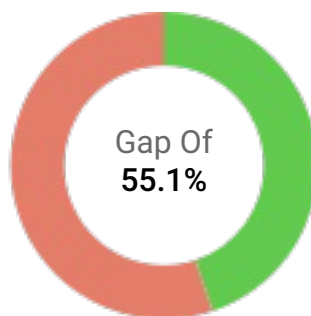
₹ 9,88,98,999

### Goal Analysis

To secure your family's financial future in your absence

You will require  
₹ 22,00,29,000

You will have  
₹ 9,88,99,000



Get Life Insurance  
Cover of  
₹ 12,11,30,000

### Protection Solution



Start making regular investments in  
**Term Life Insurance Plans**

Next Step  
**Consult test**

Disclaimer: Arrived gap is based on the inputs provided by you and the following assumptions. Inflation: 5% p.a, Investment returns rate: 6% p.a. The illustrations and calculations are for demonstration purposes only.



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# Thank You vipin kumar yadav.

If you have any doubts or need clarity on anything  
feel free to connect with me.



Mr. test

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POSP Agent



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