

TJS FINANCIAL SERVICES LLP



401-C, 4th floor, 99, Niranjan Building, Near Marine Lines Station, Marine Drive, Mumbai-400002

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Financial Planning Form

Name		Contact
Address		
Email		DOB

Family Details			
Sr No	Name	Age	Relationship
1			
2			
3			
4			
5			
6			

Income & Expenditure			
Sr No	Family Income	Annual Amount	Monthly Amount
1	Primary Income		
2	Spouse Income		
3	Other income (Rent, Interest, Investment income)		
Sr No	Family Expenses	Annual Amount	Monthly Amount
1	Household Expenses		
2	Lifestyle Expenses		
3	Loan EMI's (Home/Car)		
4	Insurance Premiums		
5	Dependent Expenses (Parents/Children)		
6	Investments (SIP/FD)		

Assets & Liabilities		
Sr No	Assets	Current Value
1	Savings Bank Balance	
2	Fixed Deposit	
3	Mutual Funds	
4	PMS	
5	Direct Equity	
6	Insurance Policies Current Value	
7	House where residing	
8	Real estate investments	
Sr No	Liabilities	Current Value
1	Home Loan	
2	Car Loan	
3	Education Loan	
4	Personal Loan	

Important Financial Commitments			
Sr No	Key Goals	Amount	Timeframe
1	Emergency Fund		
2	Retirement		
3	House Purchase		
4	Child Education		
5	Child Marriage		
6	Travel		
7	Others		