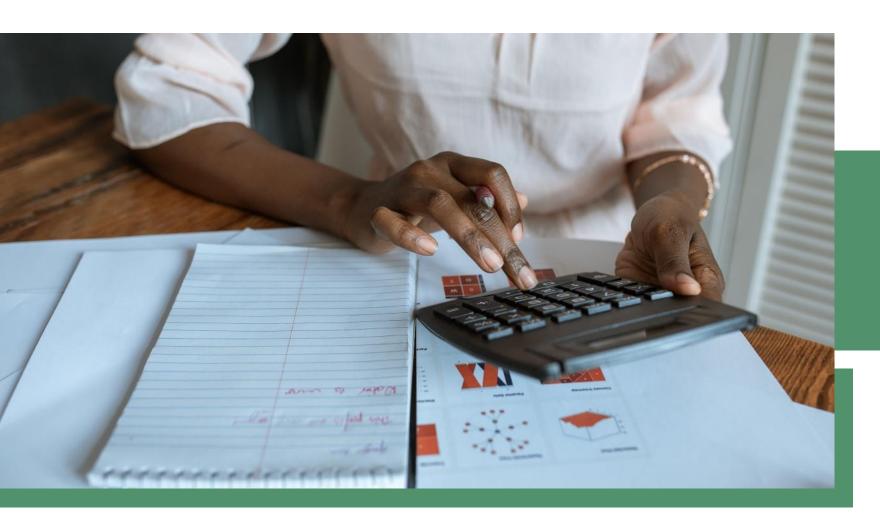


Personal Financial Planning





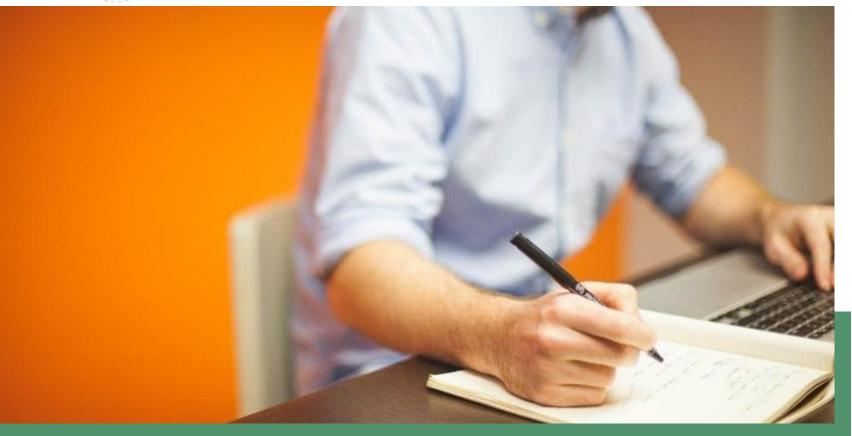
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Individual Personal Planning for Financial Expenses







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Retirement Personal Financial Planning with Expense Alternatives



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Expense Description	Expense amount	Expense amount (alternative 1)	Expense amount (alternative 2)		
o House Rent	\$250	Na	Na		
o Electricity Expense	\$25	Na	Na		
o Telephone and Internet Bill	\$25	\$20	\$15		
o House Tax	\$XXX	\$XXX	\$XXX		
o Laundry/Dry Cleaning	\$XXX	\$XXX	\$XXX		
o Text Here	\$XXX	\$XXX	\$XXX		
o Text Here	\$XXX	\$XXX	\$XXX		
o Text Here	\$XXX	\$XXX	\$XXX		

Annual Living Expense: XXX



- → Step 1: Determine your net income.
 Your net income is the foundation of an effective budget.
- → Step 2: Keep track of your spending.
- → Step 3: Establish attainable objectives.
- → Step 4: Create a plan.
- → Step 5: Adjust your spending to stay within your budget.
- → Step 6: Review your budget on a regular basis.



Monthly Personal Financial Planning with Income Savings and Expenses

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	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total Amoun
INCOME			-					-					
Monthly Income	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$6200	\$ 5,887.00
o Partner's Monthly Income	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$5200	\$ 202.00
o Dividend Receive	100.00	\$3000	\$3000	\$1000	\$2000	\$3000	SXXX	\$3000	\$1000	\$2000	\$1000	SXXX	\$ 102.00
o Interest on Fixed Deposit	55.00	\$XXX	\$1000	SXXX	\$3000	SXXX	\$XXX	\$1000	SXXX	\$0000	SXXX	\$XXX	\$ 56.00
Rental Income	500.00	\$2000	\$1000	SXXX	SXXX	SXXX	\$2000	\$1000	SXXX	SXXX	SXXX	\$XXX	\$ 501.00
o Text Here	300.00	SXXX	\$XXX	SXXX	SXXX	\$XXX	SXXX	\$XXX	SXXX	SXXX	\$XXX	SXXX	\$ 301.00
o Text Here	SXXX	\$3000	\$1000	SXXX	SXXX	SXXX	\$1000	\$1000	SXXX	SXXX	SXXX	\$XXX	\$ 116.00
Total	\$3000	SXXX	\$3000	\$1000	\$2000	SXXX	SXXX	\$3000	SXXX	SXXX	SXXX	SXXX	\$3000
SAVINGS													
o Transfer to Savings Fund	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$000	\$ 400,00
Retirement Saving Plan	\$1000	\$1000	\$1000	\$2000	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$ 100.00
o Rd Investments	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	\$2000	\$1000	\$1000	\$1000	\$ 54.00
o Text Here	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$000	\$ 400.00
o Text Here	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$3000	\$1000	\$1000	\$1000	\$ 200.00
Total	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$XXX	\$1000	XXX
EXPENSES													1
HOME													
House Hold Expense with Maintenance	\$1000	\$000	SXXX	SXXX	\$1000	\$1000	\$000	SXXX	SXXX	\$1000	\$1000	\$000	\$ 2249.00
o Groceries Shopping	\$2000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$000	\$ 24.00
 House Tax 	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$1000	\$ 39.00
 LPG Gas Bill 	\$1000	\$1000	\$1000	\$2000	\$2000	\$1000	\$1000	\$1000	\$1000	\$2000	\$1000	\$1000	\$ 43.00
o Text Here	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$ 19.00
o Text Here	\$1000	\$1000	\$000	SXXX	\$1000	\$1000	\$1000	\$000	SXXX	\$1000	\$1000	\$1000	\$ 14.00
n Text Here	\$1000	\$1000	\$1000	\$XXX	\$1000	\$1000	\$1000	\$000	\$1000	\$1000	\$1000	\$1000	5 -
o Text Here	\$2000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$1000	\$1000	\$2000	\$000	\$1000	\$ 28.00
o Text Here	\$1000	\$1000	\$1000	SXXX	\$3000	\$1000	\$1000	\$1000	SXXX	\$1000	\$1000	\$1000	\$ -



Creating a Child Financial Plan:

- → Make a plan for your child's education.
- → Determine your monthly budget.
- → The earlier you begin investing, the better.
- → Avoid low-return investments.
- → ULIP Plans for Children.
- → PPF Plans for Children's Future.
- → Maintain a long-term investment option at all times.
- → Recognize your previous investments.

Personal and Child Financial Planning with Goals

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		Financial Goal Particulars	Goal Priority	Cost of Goal	Increase in Inflation %		Funds Required
	_				% Wise	Child Age	
Child Future Planning	Jacob John	o Fund for - Elementary Education	High	\$2000	10%	12	2021 to 2022
		o Fund for - Higher Education	High	\$4000	10%	15	2021 to 2022
		o Fund for Marriage	High	SXXXX	10%	19	2021 to 2023
1		o Text Here	High	SXXXX	10%	22	2024 To 2026
E E		o Fund for – Elementary Education	High	SXXXX	XX%	XX	XXXXX to XXXX
•	Add name here	o Fund for - Higher Education	High	SXXXX	XX%	XXC	XXXX to XXXX
•	Auu name nere	o Fund for – Marriage	High	\$XXXX	XX%	XXC	XXXX to XXXX
		o Text Here	High	SXXXX	XX%	XX	XXXX to XXX
						Age	
		o Fund for - Buying a New Office	High	\$2000	10%	12	2021
2	F-1	o Fund for – International Tour	Medium	\$4000	10%	15	2021
Planning	Future needs	o Text Here	High	SXXXX	10%	19	2022
- E		o Text Here	High	SXXXX	10%	22	2025
all	Text here	o Text Here	High	SXXXX	XX%	XX	30000
<u> </u>		o Text Here	High	\$XXXX	XX%	XX	XXXX
2		o Text Here	High	\$X000X	XX%	XX	XXXX
		o Text Here	High	SXXXX	XX%	XX	30000
						Age	
	Retirement corpus	o Fund for – Insurance investment	High	\$2000	XX%	XX	2021
E		o Fund for – Medical Expenses	High	\$4000	XX%	xx	2021
au		o Text Here	High	\$30000	XX%	XX	2022
Retirement Planning		o Text Here	High	\$X000X	XX%	XX	2025



The five components of the Financial Planning Worksheet are:

- → Net Worth Statement
- → Income
- → Budget or Spending Plan
- → Financial Health Assessment with Action Plan
- → Debt Destroyer
- → Financial Links.

Personal Financial Planning Sheet with Short and Long Term Goals

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Priority	Goal	Total Cost	Duration	Monthly Cost	Target Date	
	o Pay off Credit Bills	\$2500	2 Months	\$1000	30 Feb 2021	
	o Buying a Car	\$25000	2 Months	\$12500	30 Feb 2021	
	o Taking a Vacation	\$XXX	SXXX	\$XXX	DD/MM/YY	
	o Text Here	\$XXX	\$XXX	\$XXX	DD/MM/YY	
	o Text Here	\$XXX	\$XXX	\$XXX	DD/MM/YY	
		Intermediate Goa	ils (1-10 Years)			
Priority	Goal	Total Cost	Duration	Monthly Cost	Target Date	
	o Paying for children's education	\$XXX	SXXX	\$XXX	DD/MM/YY	
	o Life Insurance	\$XXX	SXXX	SXXX	DD/MM/YY	
	o Home modifications	\$XXX	SXXX	\$XXX	DD/MM/YY	
	o Text Here	\$XXX	\$XXX	\$XXX	DD/MM/YY	
		Long-Term Goals	(Over 10 Years)			
Priority	Goal	Total Cost	Duration	Monthly Cost	Target Date	
	o Buying a Second/ Holiday Home	\$XXX	\$XXX	\$XXX	DD/MM/YY	
	o Child Marriage	\$XXX	\$XXX	5XXX	DD/MM/YY	
	o Text Here	\$XXX	\$XXX	\$XXX	DD/MM/YY	
	o Text Here	\$XXX	SXXX	\$XXX	DD/MM/YY	

FAQs

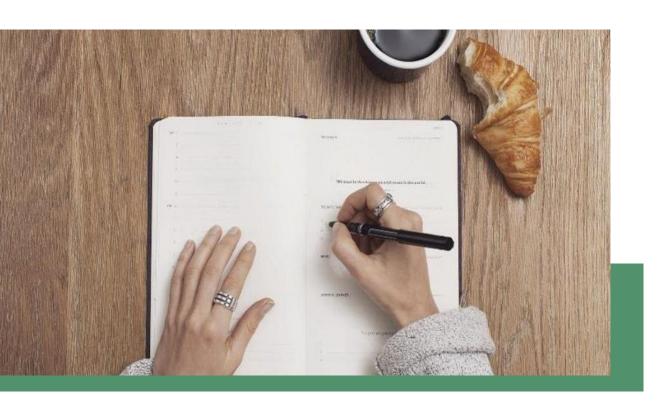




What is the 50-30-20 money rule?

- → According to the rule, you should spend up to 50% of your after-tax income on necessities and obligations that you must have or fulfil.
- → The remaining half should be divided as follows: 20% for savings and debt repayment, and 30% for anything else you desire.

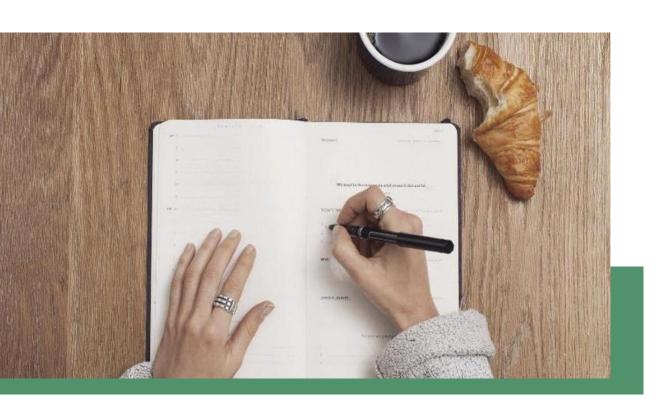




What are the steps to personal finance?

- → Find a Certified Financial Planner Professional with Experience.
- → Identify Your Current Financial Situation.
- → Create Financial Goals. Identify Alternative
 Courses of Action. Evaluate Alternatives.
 Create and Implement Financial Action
 Plans.
- → Rethink (and revise) your strategy.





What exactly is a financial plan?

- → A financial plan is a document that outlines a person's current financial situation as well as their short- and long-term financial goals.
- → It includes strategies for achieving those objectives.



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