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Financial Plan Builder

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a holistic financial plan for a client — current position (income, expenses, assets, liabilities), prioritised goals, risk profile, and recommendations across emergency fund, insurance, investments, tax and retirement, ending in an action plan. Use this for a full planning engagement. For a single goal-funding table use Goal-Based Planning; for the risk-appetite step use the Risk Profiling Questionnaire.

Purpose of this tool & output

A holistic financial plan for a client

How the output is used

Use the builder to create a holistic financial plan for a client across goals, cash flow and risk.

Who should vet it

A CA/financial planner, to validate the assumptions and suitability.

Important cautions

AI-generated structure; personalised financial advice must come from a SEBI-registered investment adviser.

Companion documents

- Goal-Based Planning Calculator
- Risk Profiling Questionnaire
- Asset Allocation Advisor
- Investment Tax Planning
- Estate & Succession Planning
- RIA Registration & Compliance

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.