

Goal-Based Planning Calculator

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

Produces a goal-based planning illustration — for each goal, the inflation-adjusted target and the monthly investment needed to reach it, plus prioritisation across goals and the assumptions used. Use this to show a client how to fund several life goals. For a full financial plan (cash flow, insurance, tax) use the Financial Plan Builder.

Purpose of this tool & output

Plan and fund every life goal

How the output is used

Use the calculator to plan and fund every life goal with the right SIP and horizon.

Who should vet it

A financial planner, to confirm the return and inflation assumptions.

Important cautions

AI-generated illustration; returns are not guaranteed; consult a registered adviser.

Companion documents

- Financial Plan Builder
- 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.