

# FINANCIAL OBJECTIVES TOOL

## Your Report

The information contained in this report is based on what you have told us and you should treat the information in this summary as a guide only.



The level of returns that your savings and investments are generating could prove to be the difference between realising your financial objectives or having to settle for something less.



# I AM NOT HAPPY WITH THE RETURNS ON MY CAPITAL

You are currently investing   lump sum and a monthly premium of   over a   year period. You would like to achieve   lump sum with a growth of



Call 0800 121 4269