

# Your FinancialMap.

**John Smith**

**Income**

2020

Salary	£34,400
Rental Income	£7,000
Dividends	£9,000

**Spending**

2020

Living Costs	£24,500
Holidays	£5,000
Taxes	£8,000

**Your Notes**

- Update my Will
- Create a Power of Attorney
- Update my pension beneficiaries
- Arrange accountant to complete end of year tax return

Cashflow

Assets

**Objectives**

1. Retire at age 60 with income of £35,000 pa
2. Travel the world at retirement - £50,000 (one-off)

**Pensions**

Invested Pensions	Income Pensions
<p>L&amp;G Pension £70,000</p> <p>Workplace Pension £100,000 £500 pm</p>	<p>Teachers Pension £8k pa @ 65</p> <p>State Pension £9k pa @ 66</p>

**Investments**

£200 pm

Aviva Investment  
£113,000  
Taxable

£20k ISA Allowance each year

Aviva ISA  
£20,000  
Tax-Free

**Cash**

HSBC Current Account £20,000	Halifax Savings Account £30,000
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Firm: Frazer James  
 Adviser: James Mackay  
 Phone: 01179 902 602  
 Emergency: 07795 526 497  
 Email: james@frazerjames.co.uk  
 Website: www.frazerjames.co.uk

