

Your **Company** Logo

Pension Forecast

for

Example Client

Created by Your Name

Your Company

Introduction

The following report contains a Pension Forecast. Your current pension pot size is taken into consideration, along with the assumed pension growth rate and the anticipated rate of inflation over the specified period. The output given is then dependent on whether you wish to reach a specific pension pot size at the end of the time period, you wish to make a specific monthly contribution over the term or you wish to take a specific monthly amount from the pension once the term has ended.

Any "RPI linked" figures will increase at the assumed inflation rate. All values shown are calculated to the nearest pound.

Overview

Forecasts included:

- I want £1,000pm in retirement

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Forecast: I want £1,000pm in retirement

Assumptions

Current pension pot size:	£40,000
Assumed pension growth rate:	6.00%
Assumed inflation rate:	2.00%
Real return rate:	4%
Income percentage to take at retirement:	5.00%
Term:	11 years (until age 66)

Forecast aim

To take a specific monthly income at age 66.

Desired monthly income in retirement (gross):	£1,000
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Outputs

Target pension fund size:	£240,000
Monthly saving to make:	£1,072