Pacha Wealth International

PLAN · PROSPER · PROTECT

Financial Snapshot

This questionnaire helps us understand your personal and financial situation, so any recommendation we make is genuinely suited to you.

It's designed to be completed at your own pace — in this PDF, on screen. There's no need to finish it in one sitting; you can save and come back to it.

It's most helpful when completed together with anyone else in your household who shares in financial decisions — a spouse or partner, for example.

Everything you share with Pacha Wealth International is treated as strictly confidential.

CLIENT 1

Full name

CLIENT 2

Full name

Date completed

About You

A few details so we know who we're planning for.

Full name

Date of birth

Do you smoke? Select...

Marital status Select...

Spouse / partner name

Children

List each child's name and age. Add extra names in the notes on the final page if you have more than four.

Child 1 name **Age**

Child 2 name **Age**

Child 3 name **Age**

Child 4 name **Age**

Contact Details

Home address

Email

Phone

Work & Income

What is your profession?

Who do you work for?

Country of residence for tax purposes

How are you paid?

Select...

What currency are you paid in?

US Dollar (USD)

Net monthly income (take-home, after all deductions)

Monthly Expenses

A rough monthly estimate is fine — this just helps us see what's available to save or invest. All amounts below are in the currency you selected in Section 2.

Insurance

Loans / credit card payments

Rent or mortgage

Utilities (electricity, water, phone, gas)

Maintenance

School fees

Socialising / entertainment

Savings

Other regular commitment 1

Other regular commitment 2

Planning for Retirement

Amounts are in the currency you selected in Section 2.

Target retirement age

Lump sum needed? Select...

If yes, roughly how much?

What would you like to do when you retire?

The Income Gap

Income needed now to live comfortably (per month)

Income needed if you retired tomorrow (per month)

Income your current pension would provide (per month)

From where would you cover any shortfall?

How much can you save now (per month)?

Years to save

As a final thought: consequences of an income shortfall in retirement

Planning for Education

For each child, in the currency you selected in Section 2.

School

	ANNUAL COST	YEARS REQUIRED	WHEN NEEDED
Child 1			
Child 2			

University

	ANNUAL COST	YEARS REQUIRED	WHEN NEEDED
Child 1			
Child 2			

Is university / higher education important to you?

Select...

How do you plan to fund this?

Amount you can save now (per month)

Years to save

As a final thought: consequences of not funding higher education

Your Existing Portfolio

List up to four, values in the currency you selected in Section 2.

Investment 1

Where held		**Type of investment**	Select...
Current value		**Start date**	
Maturity date		**Taxable?**	Select...

Purpose of this investment

Investment 2

Where held		**Type of investment**	Select...
Current value		**Start date**	
Maturity date		**Taxable?**	Select...

Purpose of this investment

Investment 3

Where held		**Type of investment**	Select...
Current value		**Start date**	
Maturity date		**Taxable?**	Select...

Purpose of this investment

Investment 4

Where held		**Type of investment**	Select...
Current value		**Start date**	
Maturity date		**Taxable?**	Select...

Purpose of this investment

Protecting Your Family & Wealth

A difficult subject, but an important one to plan for.

If You Died Today

Lump sum your family would need

Monthly income needed

Years that income would be needed for

Current provision in place

Budget to protect your family (per month)

Assets taxed on death?

Select...

As a final thought: if you were to die today, describe the financial picture for your family from tomorrow onwards

Other Savings Goals

Do you have another reason to save?

Select...

If yes, please give details

Section 9 · Risk Profile

These are general descriptions to help you choose — read each one and pick the closest fit.

Cautious
Protecting your capital matters more than growth; you're uncomfortable with big swings in value.

Cautious / Balanced
You want some growth, but still want to limit exposure to sharp short-term falls.

Balanced
You're comfortable with moderate ups and downs in pursuit of better long-term growth.

Adventurous
You're comfortable with significant short-term swings in pursuit of higher long-term returns.

Aggressive
You're focused on maximising long-term growth and can tolerate large short-term losses.

How would you describe your attitude to investment risk?

Select...

Section 10 · What Matters Most Right Now

Rank each goal by priority (1 = highest) and note a rough monthly saving amount if relevant.

Ensuring enough income in retirement	-	
Saving for children's education	-	
Protecting family if I die prematurely	-	
Income if too ill to work	-	
Making investments work harder, tax-efficiently	-	

Looking at everything above, what's the total amount you can realistically afford to put towards addressing these priorities each month, right now?

Total monthly budget available now

Who Else Might This Help?

Hopefully working through this questionnaire has helped you understand your own financial situation a little better than before you started — if so, that's a good thing. If you think someone you know or care about might benefit from a similar exercise, feel free to share a copy of this questionnaire with them, or let them know to get in touch with us.

Friends, family, colleagues or professional contacts who might benefit from a similar review — e.g. a close friend, sibling, work colleague, doctor, dentist, lawyer or accountant.

1. Name		**Contact details**	
2. Name		**Contact details**	
3. Name		**Contact details**	
4. Name		**Contact details**	

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