

Entity Details

Surname	ABC
First Name	A
Initials	A
ID Number	AAA
Date of birth	21 June 1963
Nationality	South Africa
Marital Status	Married
Retirement Age	65.0
Salary	R 600,000.00
Risk Salary	R 400,000.00
Pensionable Salary	R 500,000.00
Other Income	R 5,000.00
Highest Qualification	Degree
Current Position	Diplomat
Medical Aid Company	Discovery
Medical Aid Plan	Classic
Smoking Status	Non smoker

Contact Details

Telephone (h)	123456
Telephone (w)	123456
Cell	082123123
Email	abc@gmail.com
Residential Address	6 Olmesdahl Street, Piet Retief, 2380, South Africa
Postal Address	PO Box 886, Piet Retief, 2380, South Africa

Relationships

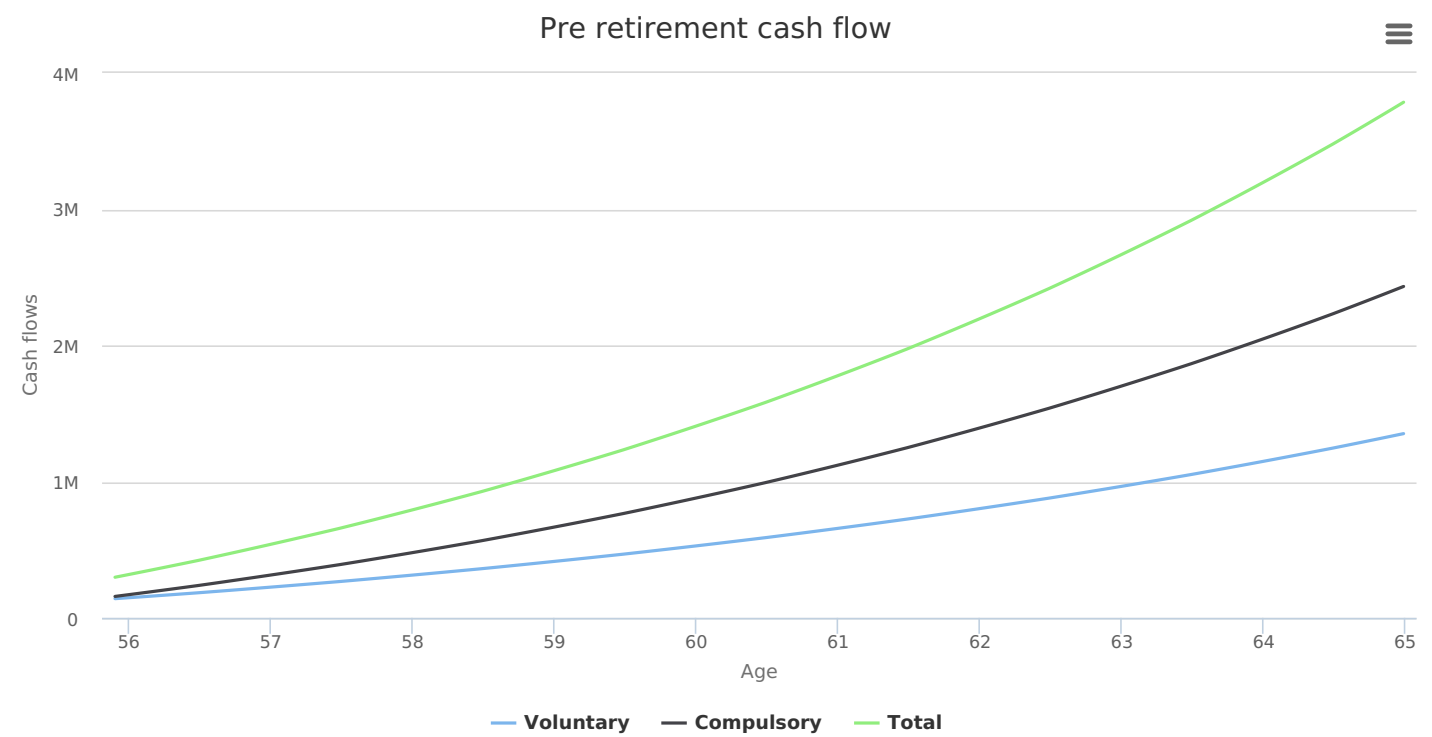
NAME	FIRST NAME	RELATIONSHIP
CBA	C	Wife

Will

Has will	Yes
Who is the executor	Mr P Brand
Where is the will	ABSA
Living will	Yes

Balance Sheet

ASSETS	R	%	LIABILITIES	R	%
Investments			Vehicle Loan		
Product A: ABC123	R 156,227.97	3.07%	Car Loan	R 8,000.00	34.78%
Product A: WWW	R 139,827.29	2.74%			
			Mortgage		
Property			Home	R 10,000.00	43.48%
Property A	R 3,000,000.00	58.87%	Holiday Home	R 5,000.00	21.74%
Holiday Home	R 1,000,000.00	19.62%			
Vehicle					
Subaru	R 800,000.00	15.70%			
	R 5,096,055.26			R 23,000.00	
Net Assets				R 5,073,055.26	



Post retirement cash flow

