



Mapping Solutions ❤️ MMS

Financial Planning for Mr. Karthi Family

NAME	AGE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
KARTHI	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62
KARTHI WIFE	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61
RIYA	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32
KIASHI	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30

Karthick Family Requirements

- 1) Guarantee Asset creation for Kids education & marriage
- 2) Retirement planning for Karthick and Doctor Karthick wife.
- 3) Family financial protection
- 4) Stock market corpus creation.
- 5) Life insurance coverage.

Asset creation using Life insurance with LIC of India.

NAME	SUM ASSURED	TERM PAYING	PREMIUM YEARLY With out GST	MATURITY	PLAN	COMMENTS
Mr. Karthick	35 lacs PWB	10/13	3,44,764	52,29,000 At age of 18	Lakshya	<u>Education purpose for riya</u> TAX FREE UNDER SECTION 10/10 D PWB-PREMIUM WAVIER BENFIT INCLUDED
Mrs. Karthick wife-Doctor	40 lacs	16/25	1,84,988	1 crore 50 thousand At age of 60	<u>Labh</u>	1 CRORE TAX FREE UNDER SECTION 10/10 D <u>Retirement corpus</u>
Riya	25 lacs PWB	7/13	4,41,621	51 lacs	Amirt baal	<u>Education purpose for riya</u> TAX FREE UNDER SECTION 10/10 D PWB-PREMIUM WAVIER BENFIT INCLUDED

kiash	55 LACS PWB	15/20	3,32,070	1 CRORE At 25 age	TARUN	1 CRORE TAX FREE UNDER SECTION 10/10 D PWB-PREMIUM WAVIER BENFIT INCLUDED
Mr. Karthick	<u>1 crore</u>	<u>25</u>	<u>17,136</u>	1 CRORE At 61 age	<u>yuva</u>	<u>Only life coverage for family</u>
Mrs. Karthick wife-Doctor	1 crore	25	18,234	1 CRORE At 60 age	yuva	<u>Only life coverage for family</u>
Mr. Karthick	40 lacs	16	2,36,000	4lacs Age of 52 to 100 yrs	utsav	TAX FREE UNDER SECTION 10/10 D You can either 10% fixed option for 100 yrs (or) You can either 5.5% compound interest for 100 yrs Asset creation for kids after parents' death also tax free.

MMS- Recommendations and solutions ❤️

- 1) All amount mentioned are guarantee and tax free- 10/10 d section
- 2) Kids education and marriage Corpus are Guarantee as mentioned- Even in Absence parents
- 3) Govt of India is supported for all returns- SOVERIGN Guarantee- section 56-ACT
- 4) Tax benefits and inflation factors are well considered and designed
- 5) Retirements are tax free for 100 yrs- after death of parent -A huge corpus is created for the kids Right now
- 6) Loan facility Available after 2yrs
- 7) Premium paid is available
- 8) Other Corpus funds can be created using STOCK MARKET AND CRYPTO CURRENCY with other reports for short term and long term purposes with are taxable in pay out

Thank you for this wonderful opportunity to serve you and your family with lots of love , care and support

From

MMS- TEAM ❤️

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