

MASTER SHEET

Voyant Go Perfect Plan Building

- 1: Enter People (from the 'Home' screen)
- 2: Set the 'Plan Settings' (bottom of the dashboard) see below
- 3: Change the plan name to - Master Plan 2020 - 'hit the 'Base Plan' top right
- 4: Timeline - add all the events you need.
- 5: Add Expenses as a Goal + State Pensions of £8,000/\$12000
- 6: Enter the financial data - hitting the + button bottom right
- 7: Add 'GIA Sweep Account' - set up the Sweep cash account correctly.

Plan Settings

Inflation / Growth

Fields marked with an asterisk (*) are required

| | | |
|-------------------------------------|---|---|
| Inflation Rate * | <input type="text" value="3"/> | % |
| Savings Growth Rate * | <input type="text" value="1.5"/> | % |
| Investment Growth Rate * | <input type="text" value="5"/> | % |
| Reinvest Investment Yield | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Property Growth/Depreciation Rate * | <input type="text" value="3"/> | % |
| National Average Earnings * | <input type="text" value="3"/> | % |
| Annuity Assumed Interest Rate * | <input type="text" value="3"/> | % |
| CPI * | <input type="text" value="2"/> | % |
| RPI * | <input type="text" value="3"/> | % |
| Default Tax Table Assumptions * | <input type="text" value="2"/> | % |

Current Liquidation Order

| |
|---------------------|
| 1. Taxable |
| 2. Tax Free |
| 3. Tax Deferred |
| 4. Drawdown Pension |

Fees & Taxation

Fields marked with an asterisk (*) are required

| | | |
|----------------|--------------------------------|---|
| Cash Savings * | <input type="text" value="0"/> | % |
| Taxable * | <input type="text" value="0"/> | % |
| Tax-Deferred * | <input type="text" value="0"/> | % |
| Tax-Free * | <input type="text" value="0"/> | % |

✓ Taxable Investments

| | | |
|--|--------------------------------|---|
| Account Liquidation Annually | <input type="text" value="0"/> | % |
| Onshore Bond Default Internal Tax Rate | <input type="text" value="0"/> | % |