

Why Financial Goals!

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A financial goal is a specific target or milestone you aim to achieve with your money, such as saving for retirement, buying a house, or funding education.

Elements of a Financial Goal



Duration



Purpose



Amount

Examples:

- ₹20 lakhs as a down payment for a house in 5 years.
- A corpus of ₹10 crores by age 60 for retirement.
- ₹1 lakh for a vacation after 2 years.

The Reward of Reaching Your Goal!

Feel great knowing you have the money you need and the sense of achievement that comes with it.

Why Do You Need Financial Goals?



Keep you focused



Instill discipline



Reduce impulse purchases

How to Invest for Your Goals:

Try Mutual Funds! With over 37 types of mutual funds available, there's one for every financial goal. Speak to your financial guide today to find the right one for you.