

## Strategic Brief

1/02/2017

Dear Mr S Sample & Mrs S Sample,

Further to recent discussions I would like to thank you the opportunity to outline my thoughts in relation to your stated financial goals. When assessing the information you provided and comparing it to a person in similar circumstances, we were able to provide an overview of the potential opportunities available to you utilising our debt reduction and wealth creation systems.

All taxation calculations are indicative and should be confirmed with your taxation adviser. Illustrations and projections are not intended to show anything other than the possibilities available with cash flow management systems based on the assumptions outlined below.

However, in terms of the information you provided, I have prepared an illustration based on the following assumptions:

### Assumptions

1. No allowance has been made for increases in either income or living expenses
  - a. Unless otherwise advised, living expenses have been calculated as 40% of take home pay.
2. No allowance has been made for Lump sum expenses other than where indicated below
3. No allowance has been made for either increases or falls in interest rates over/under 5.5%
4. No allowance has been made for legislative changes of any nature

The overriding principle behind the debt reduction and wealth creation program is to; first and foremost, focus on reducing personal debt as quickly as possible. Should an investment be included, either existing or potential, the process is intended to continue with a view to liquidate those debts as well.

This presentation illustrates a result we believe may be achievable, and are summarised as follows:

Potential results

Personal debt liquidation date: 1/10/2029  
(Including home loan & non-consolidated loans)  
Term: 12 years 9 months

Inclusive of an allowance for:

1. Holidays - \$5000 Yearly
2. Education funding - \$0 Monthly
3. Renovations - \$0
4. Motor Vehicle Purchase - \$0

We hope the above illustration serves to help you see and understand the opportunities available to you utilising the Tailormade Financial Strategies debt reduction systems.

Yours faithfully,



Chris Rule  
Mortgage Escape Australia Pty Ltd