



# INVESTMENTS PLANNING FOR GROWTH

This case study is fictitious and is purely designed as an example to illustrate a possible financial planning scenario – no photographs, names, quotes or details included in the case study relate to real customers. Any matches or similarities with an individual are by chance and unintentional.

Name: Mr Ganesh

Age: 34

Occupation: Local Authority employee

Married, two children

Providing for his children's future is Mr Ganesh's first priority. His older child has just started secondary school, and that milestone has made him focus on some long term goals – one of which is being able to help both of his kids onto the property ladder when they've finished their education.

Mr Ganesh would describe himself as quite a cautious investor – he wants to get better returns on his money, but he doesn't really want his capital to lose value if possible.

His Financial Planning Manager has been very helpful in establishing just how much risk he's comfortable with, and has recommended a mixed portfolio of investments that compliments this. This has reassured Mr Ganesh that his financial plan is tailored to his goals, and hopefully will help him to achieve them.

## HOW BARCLAYS FINANCIAL PLANNING CAN HELP

- We'll assess your financial situation, needs and aspirations
- We'll help you to find out how much investment risk you're comfortable with
- We'll work with you to identify your short, medium and long term investment goals
- We'll discuss your options together and recommend appropriate solutions

Please remember that the value of investments and any income from them can go down as well as up, so you could get back less than you put in.