

VOYANT GO CHEATSHEET

Use the checkpoints below, and the assumptions to build a robust plan in Voyant Go. Remember: Garbage In = Garbage Out, so these are important!

Perfect Plan-building Steps

1. Enter **People** (from the Dashboard, plus button at bottom right)
2. Set the **Plan Settings** to those in the screenshots below
3. Add all events to the **Timeline** that you think you might need
4. Add expenses as a **Goal** (pre-retirement goal, then change the timings)
5. Add State pensions
6. Add all other financial data in the **Dashboard** by hitting the big green Plus button
7. Add a GIA sweep account and set up the sweep cash account accordingly

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"/>	%
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="3"/>	%
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

5. Line of Credit

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"/>	%