

Annotated Report Guide for...

Education Goals Summary

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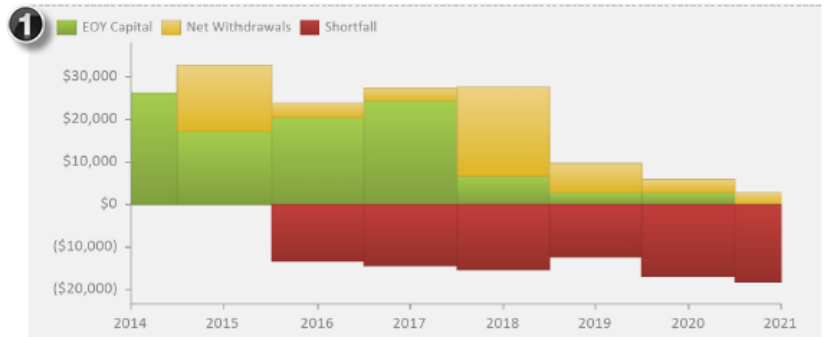
When evaluating multiple education goals this report gives an overall picture of your clients' needs in one graph.

1 This graph shows year-over-year education goal progress. Green is the total capital for all goals, yellow shows when a cost occurs and the assets withdrawn to cover them. The red shows when a shortfall exist.

2 Goal Coverage allows the client to see which goals need the most attention or which ones may be overfunded.

Education Goals Summary

This report provides a summary of all the education goals entered in the analysis. Use the graph to get a year-over-year view of progress toward all the goals.



Education Goal	Cost Today	Years Until Need	Number of Years Needed	Projected Cost	Capital at Start of Goal	Goal Coverage
Tasha	\$15,000	4	4	\$78,585	\$21,543	40%
James	\$15,000	1	4	\$67,884	\$15,607	37%

Important: The calculations or other information generated by NaviPlan® version 13.0 regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. These calculations are shown for illustrative purposes only because they utilize return data that may not include fees or operating expenses, and are not available for investment. If included, fees and other operating expenses would materially reduce these calculations.