

Annotated Report Guide for...

Major Purchase Goal Details

Major Purchase Goal Details

- 1 The amount needed the day of purchase. This is determined by inflating the cost today at the index rate specific until the year of purchase.
- 2 This is your client's ability to cover the cost of the major purchase goal.
- 3 Savings less the Cost gives the shortfall for this major purchase goal showing that the client will need more savings to meet the goal at 100%.

Major Purchase Goal Details

New Car

This report provides details for New Car including how the total cost was determined as well as the savings details.

Major Purchase Goal

	Cost Today	Purchase Date	Index Rate for Costs	Projected Cost
New Car	\$20,000	Jan 1, 2019	3.00%	\$23,185
A	Total Projected Cost of Major Purchase Goal			\$23,185

Major Purchase Savings

	Current Savings	Monthly Savings	Assumed Return Rate	Future Value of Savings Applied to Goal
New Car Savings	\$5,000	\$100	5.00%	\$11,147
B	Total Savings Applied to Goal			\$11,147
B-A	(Shortfall)			(\$12,039)

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.

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