

Annotated Report Guide for...

Major Purchase Goals Summary

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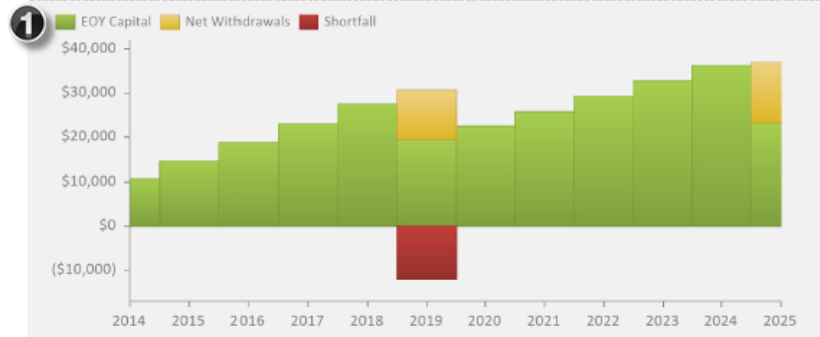
When evaluating multiple major purchase goals this report gives an overall picture of your clients' needs in one graph.

1 This graph shows year-over-year major purchase 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 Green is the total capital for all goals, yellow shows when a cost occurs and the assets withdrawn to cover them.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 provides a picture of when a shortfall exists for any given goal.

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

Major Purchase Goals Summary

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



Major Purchase Goal	Cost Today	Purchase Date	Index Rate for Costs	Projected Cost	Future Value of Savings Applied to Goal	Goal Coverage
New Car	\$20,000	Jan 1, 2019	3.00%	\$23,185	\$11,147	48%
Europe Vacation	\$10,000	Jan 1, 2025	3.00%	\$13,842	\$13,842	100%

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.

Prepared by Christopher Lerner

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