

Annotated Report Guide for... Education Goal Progress Summary

Education Goal Progress Summary

Focusing on the basics of meeting goals, this report shows goal coverage based on current values versus where they should be tracking and the total differences between the two scenarios.

1 Assets Funding At Start of Goal compares current values projected to goal start date for education assets versus where they should be and calculates the difference value between the two.

Difference = Where You Are Tracking as of Goal Start Date - Where You Should Be Tracking as of Goal Start Date

2 Education Goal Coverage Lists percent of goal covered currently versus where you should be tracking.

3 Plan Overview - Where You Are Tracking lists assumptions of the plan based on current values.

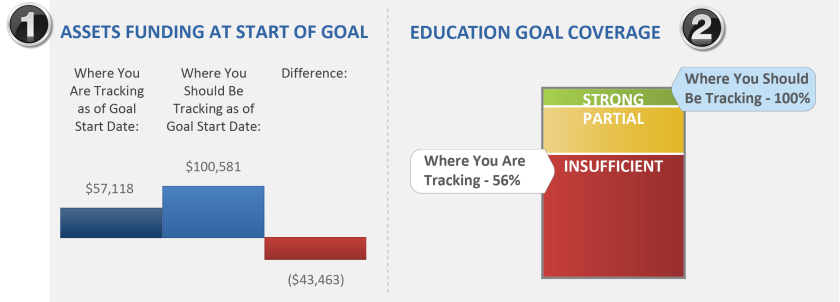
4 Plan Overview - Where You Should Be Tracking lists assumptions of the plan based on where the current values should be to meet need.

5 How to Get Back On Track lists options for both current plan and where the current plan should be in order to meet needs.

Education Goal Progress Summary

University Education (Emily) - Are You On Track?

You are currently tracking behind on this goal. Consider implementing one more of the strategies previously recommended to help achieve this goal.



Plan Overview	Where You Are Tracking	Where You Should Be Tracking
Start Year of Education	07/01/2041	07/01/2043
Annual Cost Index Rate	0.00%	0.00%
1st Year Need*	\$28,750	\$28,750
Duration of Goal (Years)	4	4
Expense % Coverage	3.31%	3.31%
Estimated Total Cost	\$115,000	\$115,000
Rate of Return	3.31%	3.31%
Assets Funding This Goal	\$8,323	\$8,405
Assets Funding at Start of Goal	\$57,118	\$100,581
Year of First Shortfall	2042	--
How To Get Back On Track	Progress Plan	Proposed Plan
Alter Spending	\$56,000	\$99,000
Save Monthly	\$103	\$0
Save a Lump Sum	\$24,149	\$59

* = Today's Dollars

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Prepared by 0 8, 2

Page 1 of 2